Zendesk User Manual – Agent

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Support:

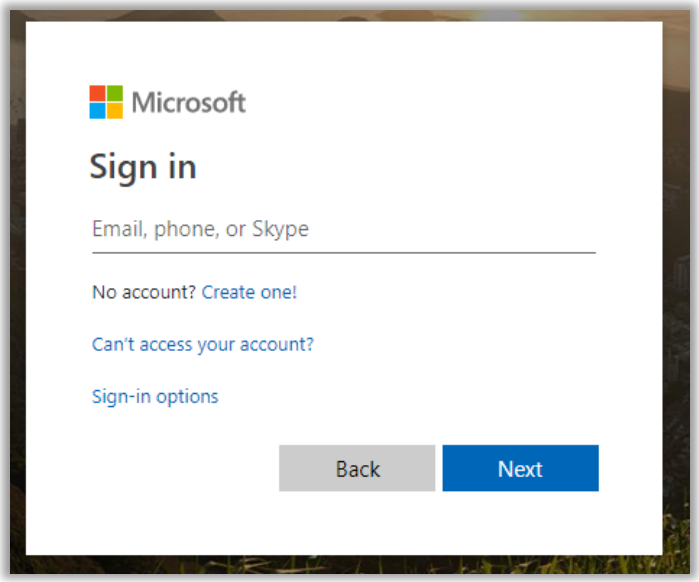
The **Support** interface is the technicians main view of **Zendesk**. This is where **Agents** view **Organization** information, view and update **User** information, as well as viewing and creating **Tickets** for customer issues. The following sections will guide you through accessing, navigating, and using the Zendesk Support interface.

Logging In:

There are 2 ways to access the Zendesk Support login page: directly or indirectly.

Directly –

1. Navigate to https://apteryx.zendesk.com/agent
2. This should automatically put you in a **Microsoft Login** page. Fill in your Apteryx login credentials.
    a. Username: *firstname.lastname*@apteryx.com

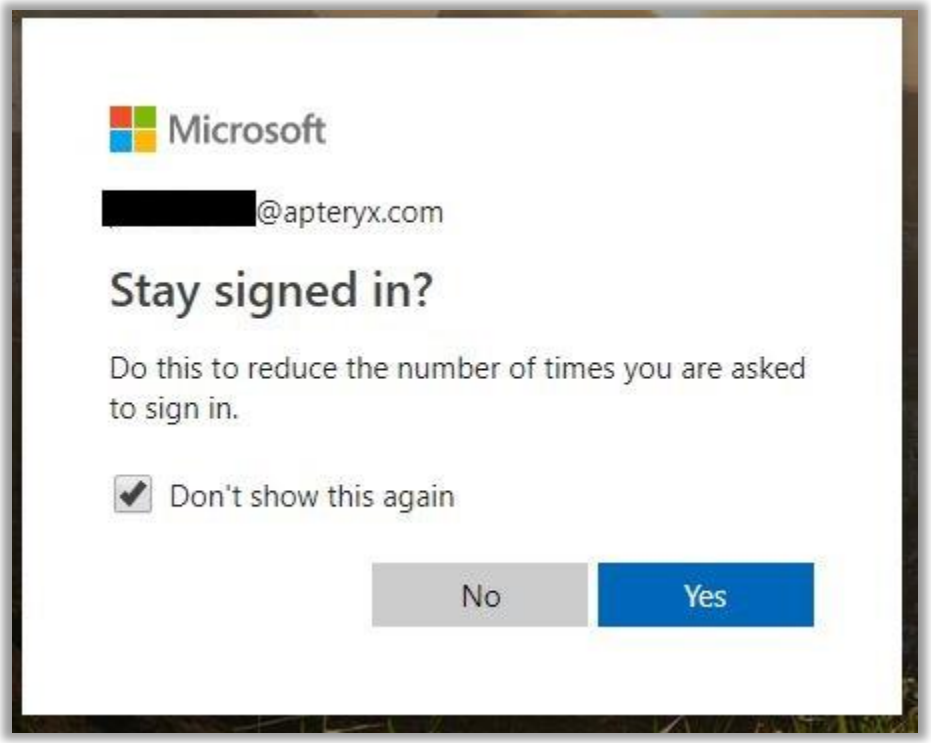


Click **Next**.

b. Password: *user created*

Click **Sign in**.

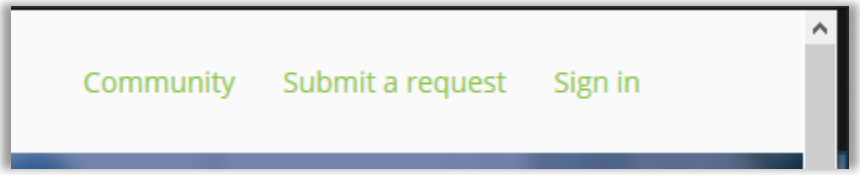
3. If you want this browser to remember your login, check the box for **Don't show this again** and then click **Yes**.



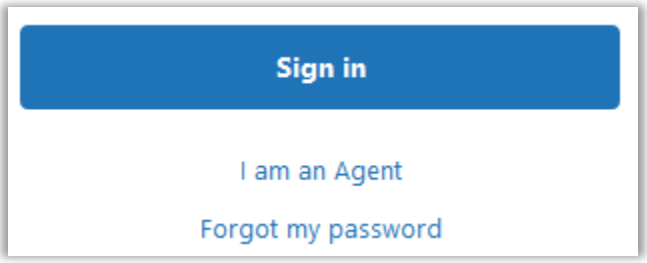
4. You should now be within the Zendesk Home page.

Indirectly –

1. If you navigate to https://apteryx.zendesk.com (the Help Center), there is a **Sign in** link in the upper right of the page.

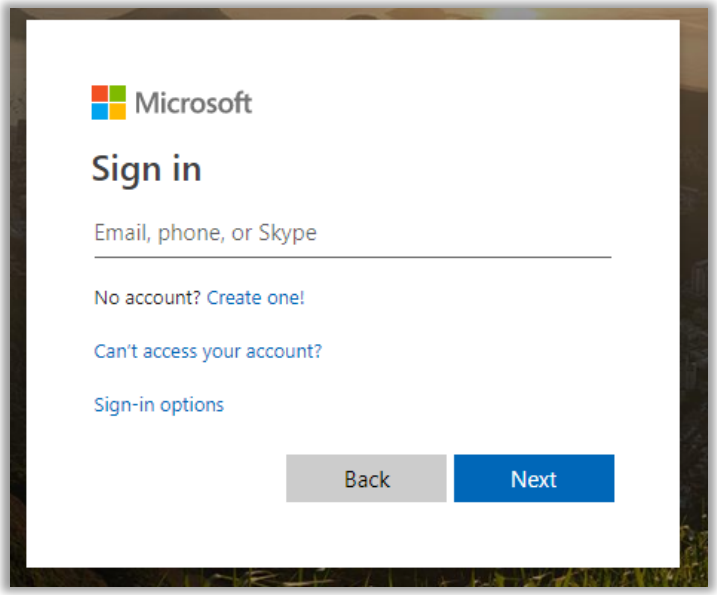


2. Clicking the **Sign in** link launches the login pop-up. Below the blue **Sign in** button is a link for **I am an Agent**. Click this link.



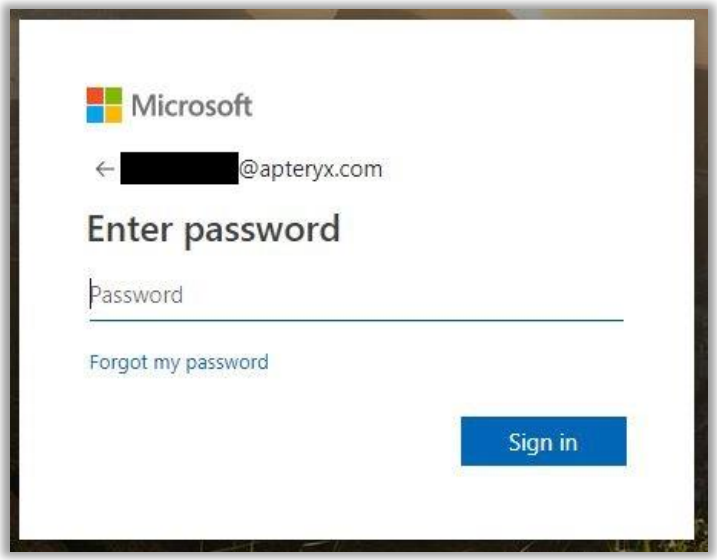
3. This should now take you to the **Microsoft Login** page. Fill in your Apteryx login credentials.

a. Username: *firstname.lastname*@apteryx.com



Click **Next**.

b. Password: *user created*

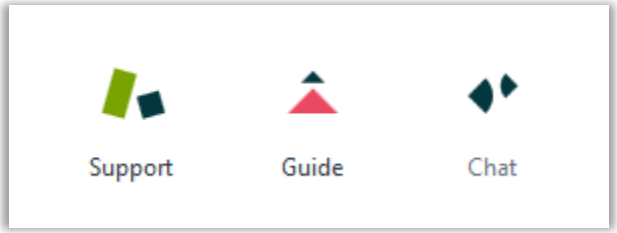


Click **Sign in**.

4. If you want this browser to remember your login, check the box for **Don't show this again** and then click **Yes**.

5. You should now be within the Zendesk Home page.
    a. If you still find yourself within the Help Center, Click the 4 squares in the upper left:

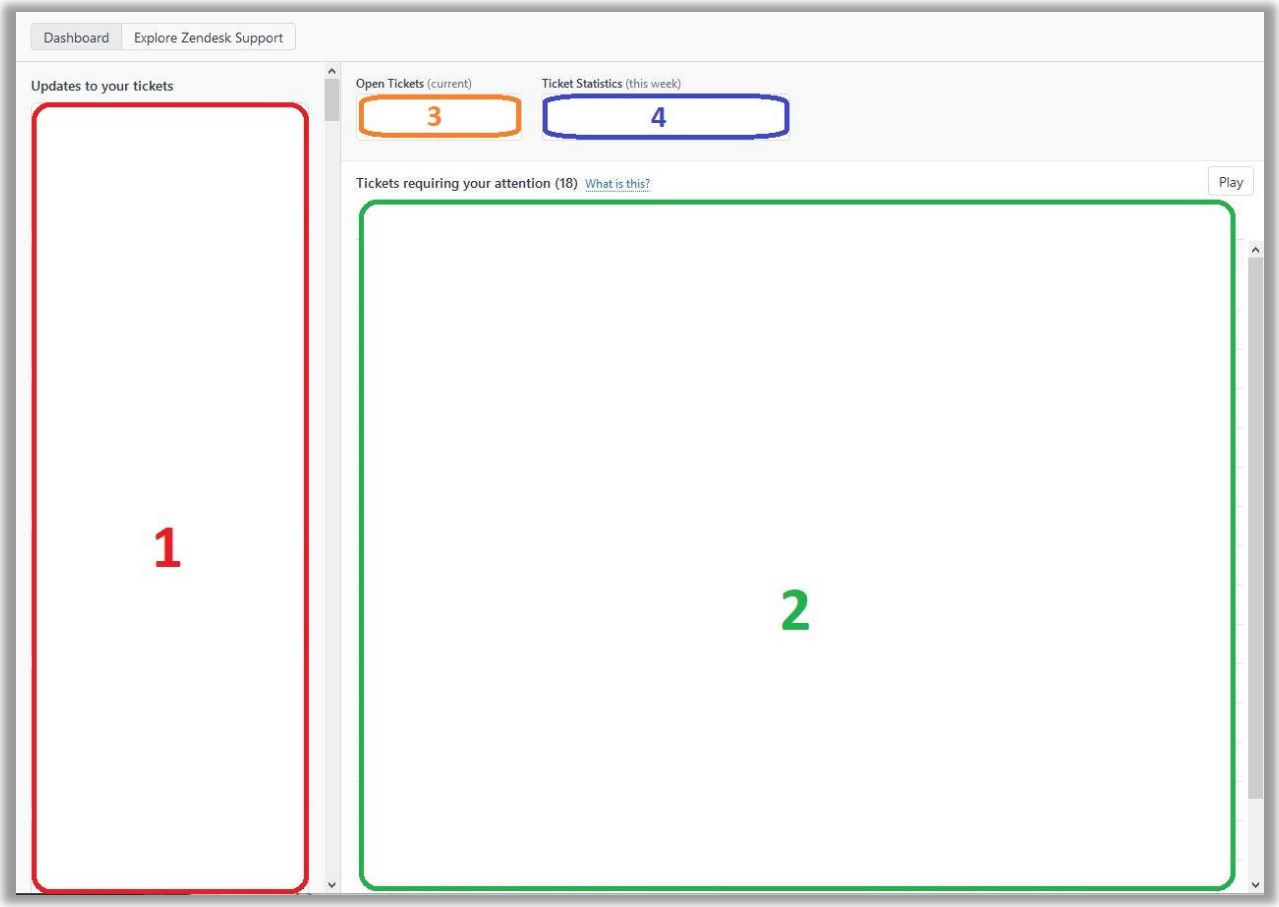
Then select the Support icon.



Support Views:

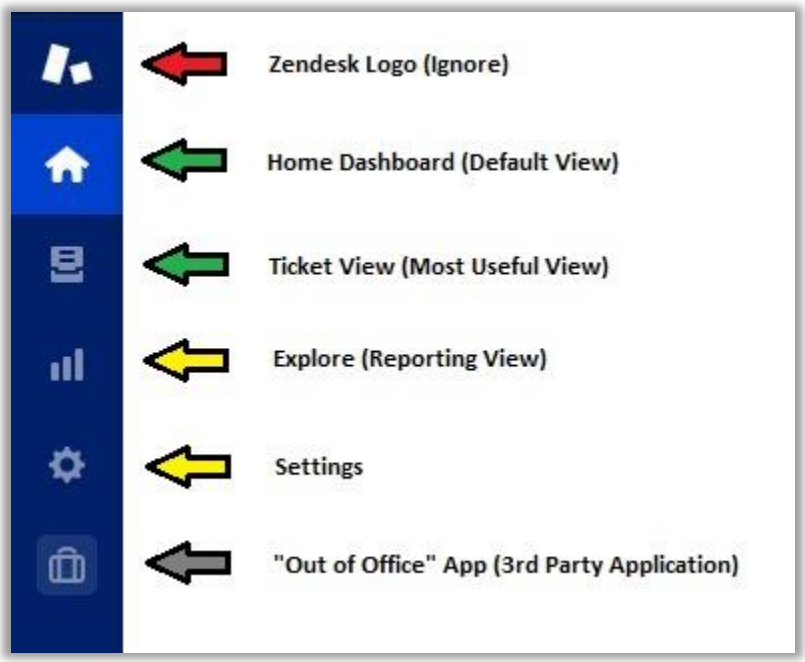
Within the Support Interface are different pages of information called “Views”. In general, there are 5 views that are the most commonly used: Main Views, Search, Organization Information, User Information, and Ticket Information. These primary pages will be explained in detail in the following sections.

The default page (Home View) contains recent updates to Tickets assigned to you on the left, and all currently open tickets unassigned or assigned to you on the right. You may personally find this page useful, however most of the following descriptions will ignore this screen.



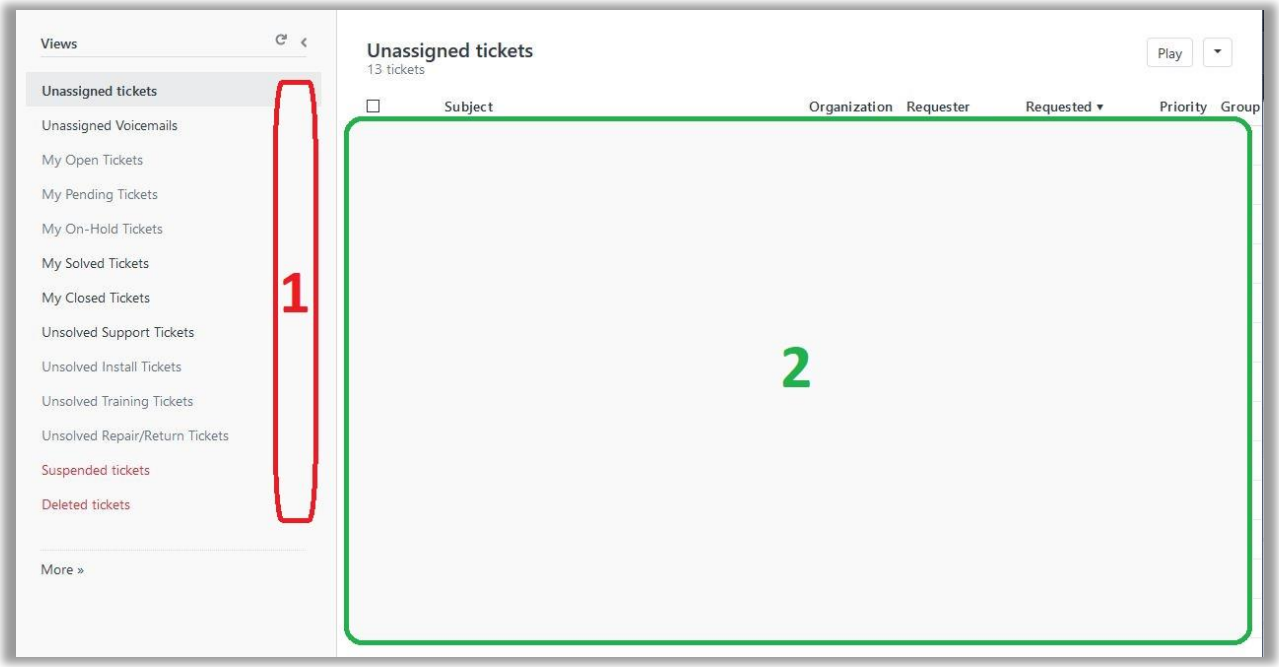
1 ~ **Updates to your tickets** – A feed view of updates to tickets assigned to you / your group
2 ~ **Tickets requiring your attention** – A list of tickets (not solved) assigned to you / your group
3 ~ **Open Tickets** – Counter for open tickets assigned to you / your group
4 ~ **Ticket Statistics** – Customer Responses on Tickets assigned to you within the past week

Navigating between views are done using either the **Side Bar** and the **Top Bar**.



Main Views:

The Main View is a collection of Tickets in simpler groupings. Which grouping is being viewed is picked form the left hand column, while the right section shows the Tickets themselves.



1 ~ **Ticket Count** – Counter for tickets assigned to you / your group / other groups
2 ~ **Ticket Info** – A list of tickets within the selected View from the left

The default groupings are as listed:

1. **Unassigned Tickets (N/O)** – All *New* or *Open* Tickets that have not been assigned to anyone
2. **Unassigned Tickets (P/H)** – All *Pending* or *On-Hold* Tickets that have not been assigned to anyone
3. **Recently Updated Tickets** – All Tickets updated within the last 8 hours
4. **My Open Tickets** – All *Open* Tickets assigned to current user
5. **My Pending/On-Hold Tickets** – All *Pending* or *On-Hold* Tickets assigned to current user
6. **My Solved/Closed Tickets** – All *Solved* or *Closed* Tickets assigned to current user
7. **Open Dev Tickets –** All *Open* Tickets currently assigned to the Development team
8. **Unsolved Support Tickets** – All Tickets assigned to the Support group with a status below Solved
9. **Feature Requests –** All Tickets (less then *Solved*) tagged as Feature Requests
10. **Suspended Tickets** – Tickets marked as SPAM
11. **Deleted Tickets** – SPAM Tickets automatically deleted after 30 days and all manually deleted Tickets

Search View:

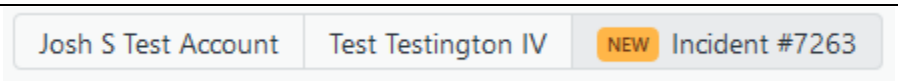
There are keyboard shortcuts to accessing the 2 different searches.

Basic Search – The same function as clicking the magnifying glass icon in the upper right

Advanced Search – The results screen of a basic search, also accessible via *+Add* > *Search* + Add

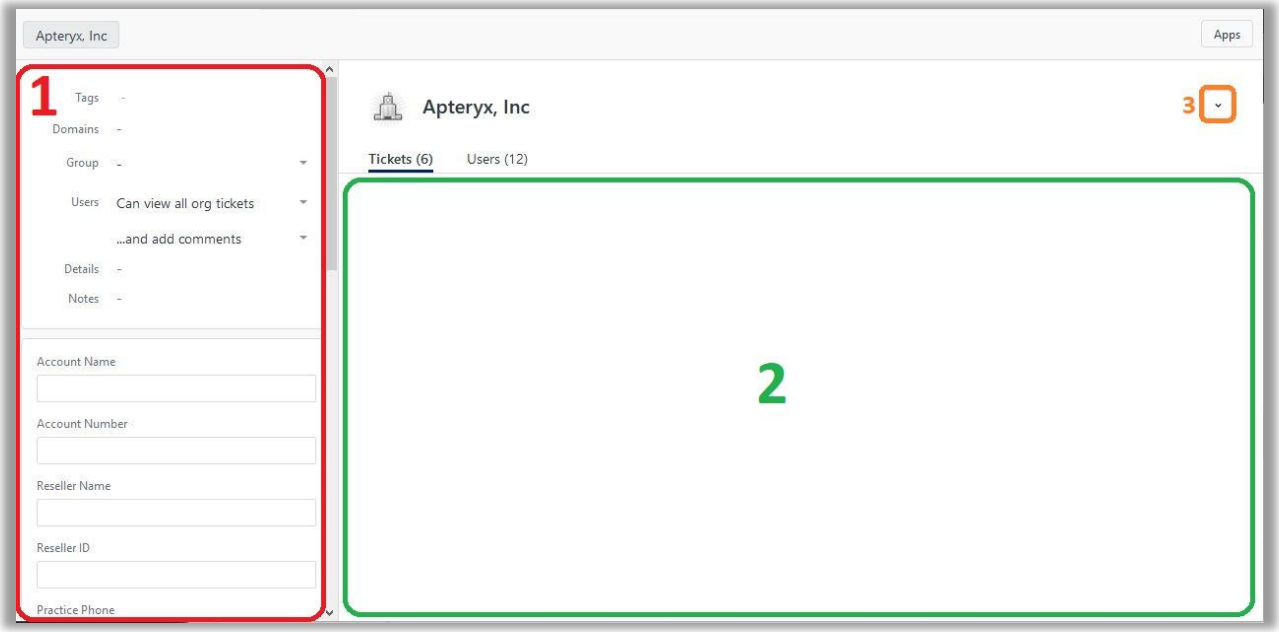
The Search view is used to find **Tickets**, **Users**, Help Center **Articles**, and **Organizations**. Simply type in the information you would like to search against in the search field and press the Enter key on your keyboard. Select the intended category you are searching for by clicking on its label, then find your Ticket/User/Article/Organization within the listed results.

Organization View:



This **Hierarchy** is listed at the top of every **Organization**. The leftmost button is the currently open **Organization**. Next is the currently open **User** (if no user is Open, only the Organization button will exist). Lastly is the currently open **Ticket** (if no Ticket is open, only the Organization and User buttons will exist).

There are 2 main sections to the Organization view; The information about the Organization, and the Tickets and Users attached to the Organization.

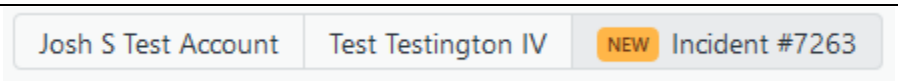


1 ~ **Organization Fields** – Custom information about organization
2 ~ **Tickets/Users**– A list of tickets and/or users attached to this organization
3 ~ **Org Options** – Create User or Delete Organization

The Organization fields can contain the following information:

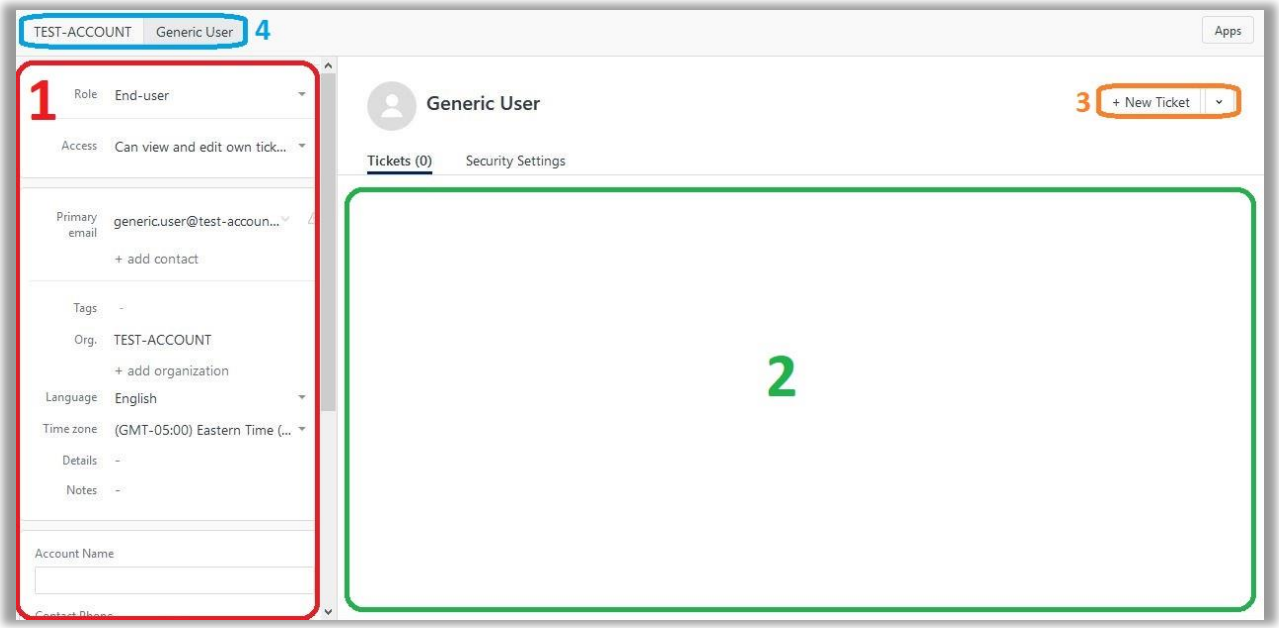
1. **Salesforce Info** – Account Name, Account Number, Account ID
2. **Reseller Info** – Reseller Name, Reseller ID
3. **Office Info** – Phone Number, Address, Email, Account Type, Account Specialty
4. **Product/Support Info** – XVWeb Address, Registration Numbers, Support Expiration Dates, Courtesy Call Dates

User View:



This **Hierarchy** is listed at the top of every **User**. The leftmost button is the currently open **Organization**. Next is the currently open **User**. Lastly is the currently open **Ticket** (if no Ticket is open, only the Organization and User buttons will exist).

There are 2 main sections to the User view; The information about the User, and the Tickets attached to the User.

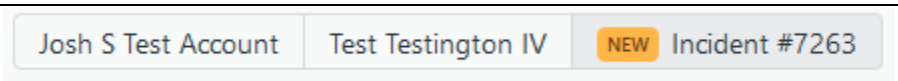


1 ~ **User Fields** – Custom information about user
2 ~ **Tickets / User Settings** – A list of tickets attached to this user and the user's security settings
3 ~ **User Options** – New ticket, merge user, suspend user, delete user
4 ~ **Heirarchy** – Organization | User

The User fields can contain the following information:

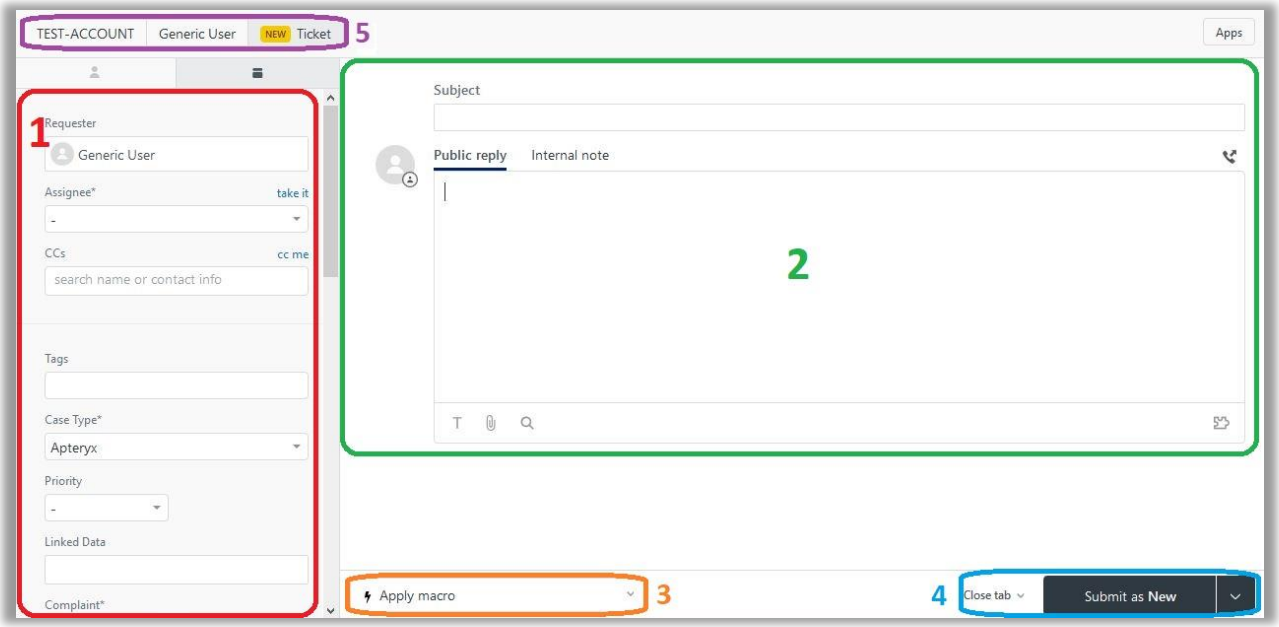
1. **Salesforce Info** – Account Name, Contact ID
2. **Contact Info** – Phone Number(s), Email

Ticket View:



This **Hierarchy** is listed at the top of every **User**. The leftmost button is the currently open **Organization**. Next is the currently open **User**. Lastly is the currently open **Ticket** (if no Ticket is open, only the Organization and User buttons will exist).

There are 2 main sections to the Ticket view; The information about the Ticket, and the customer communication/notes.



1 ~ **Ticket Fields** – Custom information about ticket

2 ~ **Subject/Dialogue** – The ticket subject and dialogue between agent and end-user (**Public reply** is visible by customers, **Internal note** is only visible by fellow agents)

3 ~ **Macros** – Pre-made responses and automations

4 ~ **Ticket Options** – Close tab without saving or submit ticket (as new/open/pending/on-hold/solved)

5 ~ **Heirarchy** – Organization | User | Ticket

Ticket Fields (Top Section):

1. **Requester** – The end-user attached to the ticket (currently will be a "generic user" in most cases)
2. **Assignee** – The agent attached to the ticket (unless manually assigning the ticket to another agent, click the take it link attached to this field)
3. **CCs** – Email addresses other than the Requester that will be included in the ticket

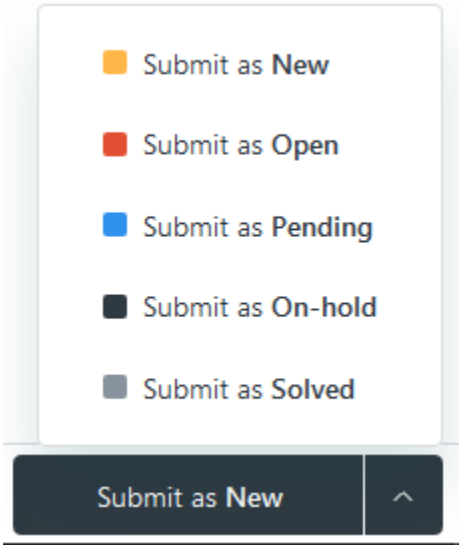
Ticket Fields (Bottom Section – indented fields are conditional)

1. **Tags** – Automatically added – **IGNORE**
2. **Priority** – Self explanatory
3. **Ticket Product** – ***MANDATORY*** – What Apteryx product is the Ticket regarding? (can be multi-select)
4. **Ticket Root Cause** – ***MANDATORY*** – Was the issue because of Apteryx Software/Hardware or because of a 3rd party?
5. **Ticket Issue/Reason** – ***MANDATORY*** – What was the cause of the issue?
6. **Origin** – How the Ticket was brought into Zendesk
    a. **Origin Company** – If **Origin** is ***Shared***, this field tells where the Ticket is from
        i. **Phone Extension** – PDDS Field
        ii. **Support Request Type** – PDDS Field
        iii. **Phone** – PDDS Field
        iv. **Office Location Name and ID#** – PDDS Field
        v. **Patient Name and ID# of Problem** – PDDS Field
    b. **Practice Phone No.** – ***MANDATORY*** if **Origin** is ***Web Portal***
7. **Complaint** – ***MANDATORY*** – Is this ticket a *complaint*?
   A complaint is defined as "Any written, electronic, or oral communication alleging deficiencies in a released Apteryx product that involves software crashes, unexpected results, user confusion, misleading verbiage in the user interface, or lost data.
    a. **Complaint Reference** – OnTime Ticket or VSTS Link (if **Complaint** field is **Yes**)
    b. **Justification** – Reason why no investigation is needed (if **Complaint** field is **Yes, but no investigation needed**)
8. **Potential Hazard/User Injury** – Does the current issue pose a potential hazard? Has there been a user injury in this issue?
9. **Affected Hardware** – The hardware associated with the current issue
10. **Serial Number** – Hardware serial number or software registration number associated with current issue
11. **RMA?** – Is this ticket an RMA?
    a. **Shipping Contact Name** – ***MANDATORY*** if **RMA?** is **Yes** – the name of someone at the office we would ship the parts to
    b. **Shipping Contact Address** – ***MANDATORY*** if **RMA?** is **Yes** – the address to where we would ship the parts
    c. **Preferred Contact Email Address** – ***MANDATORY*** if **RMA?** is **Yes** – in which the Hardware team will use for all further contact
    d. **Prefferred Contact Phone Number** – ***MANDATORY*** if **RMA?** is **Yes** – a number to call in case the RMA tech needs more info
    e. **RMA Product** – ***MANDATORY*** if **RMA?** is **Yes** – The hardware associated with the RMA (currently only Tuxedo and Tuxedo-A sensors)
    f. **RMA Serial Number** – ***MANDATORY*** if **RMA?** is **Yes** – The serial number of the hardware associated with the RMA

g. **RMA Type** – ***MANDATORY*** if **RMA?** is **Yes** – Repair (sensor is under warranty and is not functioning properly), Return (customer just wants to return the product), or exchange (customer purchased the wrong sensor, IE size 2 to size 1)
h. **Tamper Seal State** – ***MANDATORY*** if **RMA?** is **Yes** – Was the box opened?
i. **Failure Type** – ***MANDATORY*** if **RMA?** is **Yes** – Was the hardware dead-on-arrival, or did it cease functioning properly after usage?

12. **Velscope** – Marking that the Ticket is regarding Velscope
13. **Escalate to Development** – Flags Ticket to automate Escalation
14. **Ticket Priority** – Automatically populated with a Ticket Weight to organize Tickets in main View

Ticket Submission Types (Status)

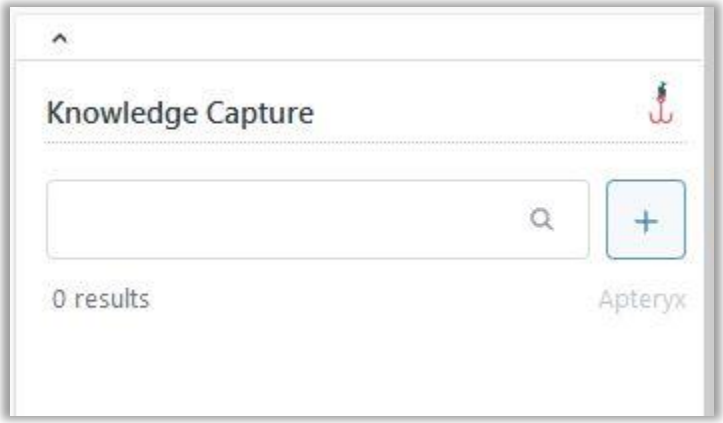


- **New** – Ticket has not been viewed / assigned
- **Open** – Ticket is currently being worked / has been responded to by customer
- **Pending** – Ticket is waiting on customer response
- **On-Hold** – Ticket is waiting on 3rd party response (anyone other than Agent or Customer)
- **Solved** – Ticket has been resolved

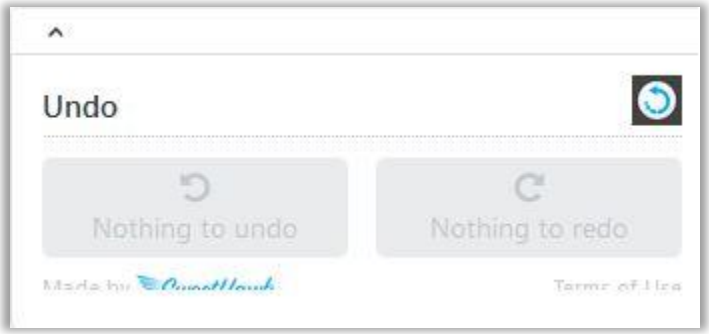
Applications:

In the upper right of the Ticket view, there is an **Apps** button. Clicking on this button pops out a side bar with multiple applications that may be visible (some only if the Ticket is active, meaning it has a Ticket Number). Some of these applications will be useful, some should be ignored. They may or may not appear in the order below:

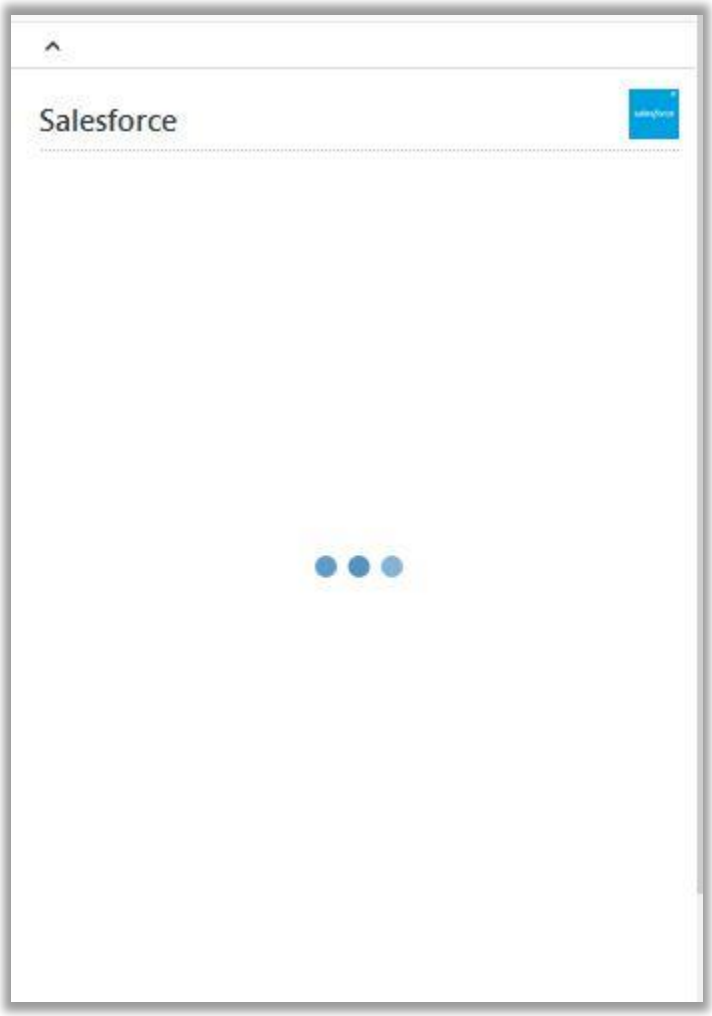
Knowledge Capture – Enable agents to search, link, flag, and create Help Center articles from tickets.



Undo – The Undo App lets you undo and redo live changes you've made to a ticket. *(unable to undo a ticket submission)*

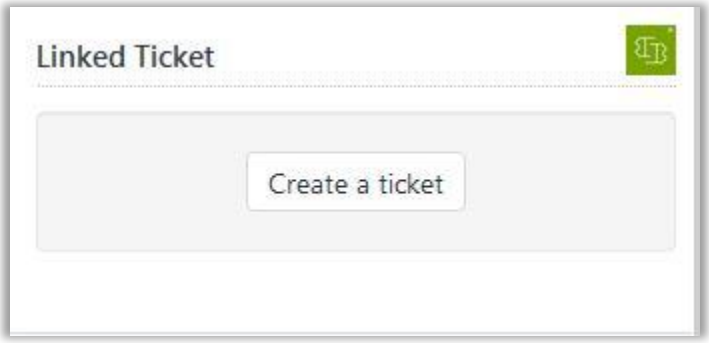


Salesforce – Read-Only information from Salesforce.
(Cases, Assets, Opportunities, and Implementations – Only shows 5 instances of any type – Only visible on active tickets)

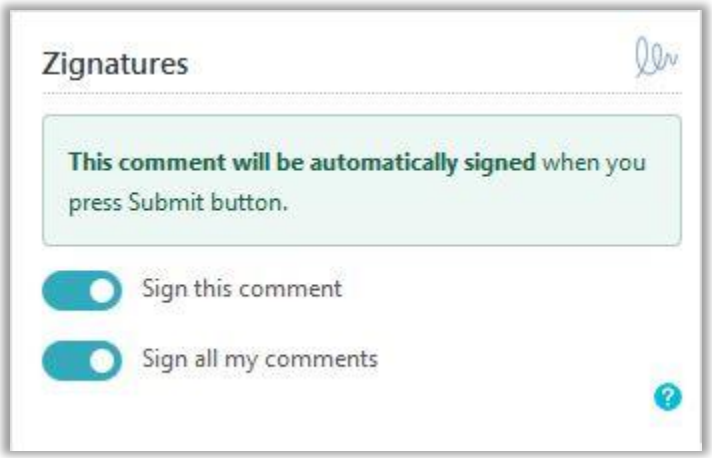


Ticket History – Other recent tickets submitted by the same end-user.
(*Only visible on active tickets)*

Linked Ticket – Create and link a ticket from an existing one.
(if new/different issue presents itself. Only visible on active tickets)



Zignatures – Rich Text Signature
(gives you options to turn your signature on/off for this/all tickets)



Out of Office – Manage, display, and act on the availability of Zendesk Support agents.
(ticket view shows only the agent assigned to the current ticket, the briefcase icon shown on the left side bar will show all agents)

Download All Attachments – Easily download any/all attachments from a ticket.
(will grab all attachments from entire dialogue thread. Only visible on active tickets)

Guide:

The **Guide** interface is the technicians main view of the Apteryx **Help Center**. This is where both the End-User Knowledge Base (**Public**) and the Agent Knowledge Base (**Internal**) are accessible. Articles of walkthroughs, tips and tricks, explanations, and more are available for reference. Public articles can be accessed by anyone, while Internal articles can only be accessed by Agents. The following sections will guide you through accessing, navigating, and using the Zendesk Guide interface.

Accessing the Help Center:

The Help Center can be navigated to either directly or indirectly:

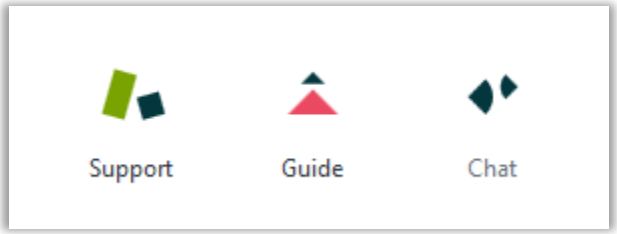
Directly –

1. Navigate to https://apteryx.zendesk.com/hc
2. This should automatically take you to the Help Center, regardless of whether or not you are currently logged into Zendesk

Indirectly –

1. Within the **Support** interface, click the 4 squares icon in the upper right

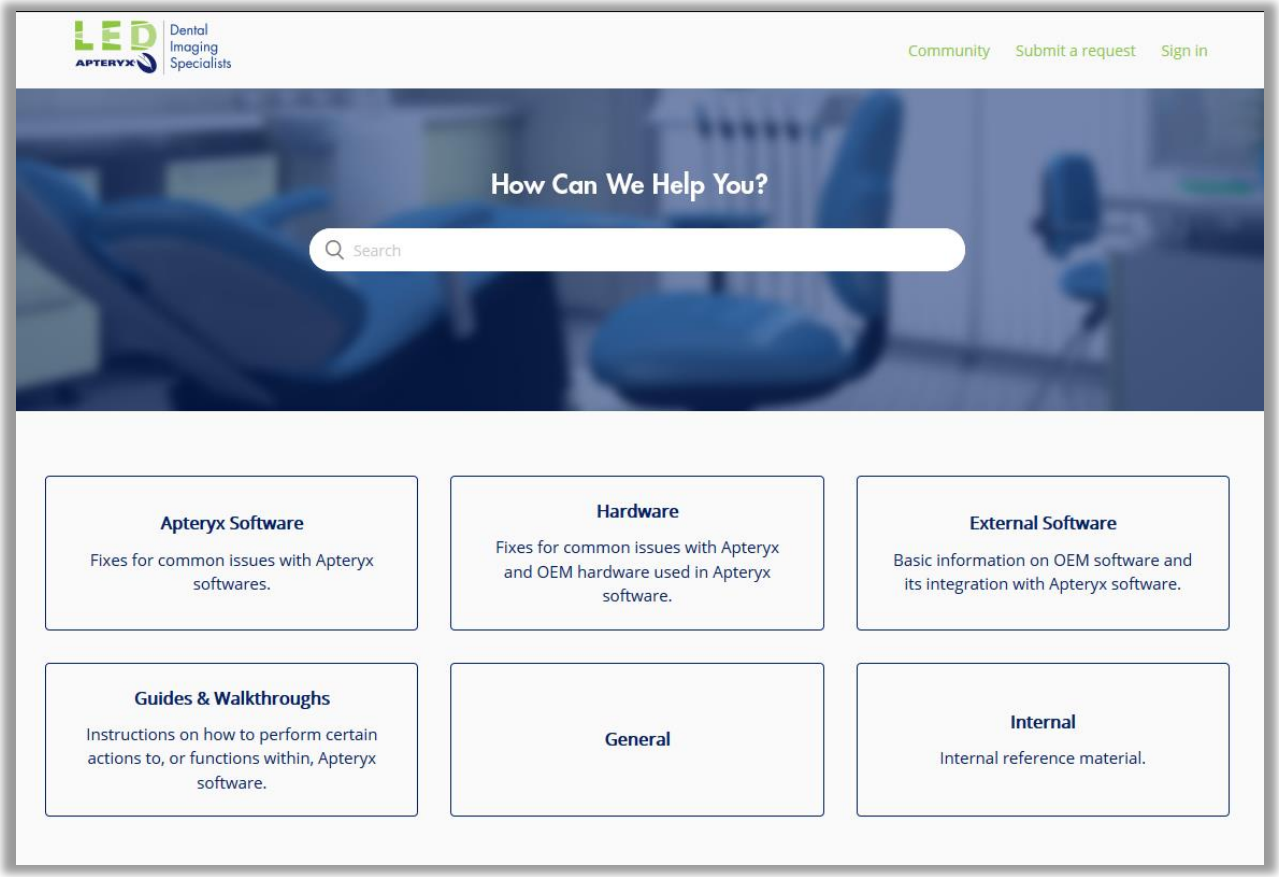
2. Click on the **Guide** icon



3. This should open a new browser tab of the Help Center

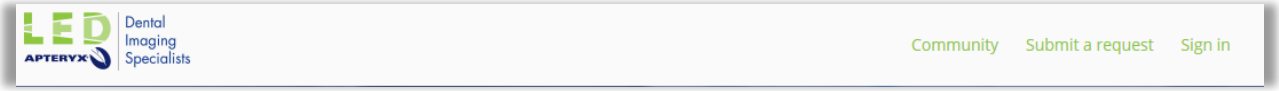
Help Center Basics:

There are 3 basic sections to the Help Center: The Top Bar, the Search, and the Articles.

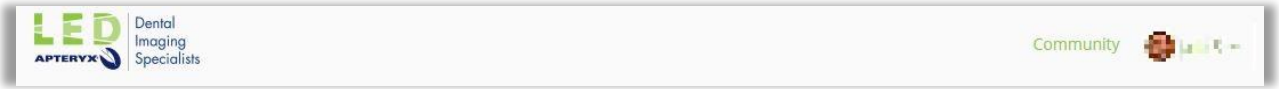


The Top Bar

The upper section of the Help Center is available on all pages. It generally contains our **Logo** (a link to our main website), a **Submit a request** link (Ticket creation via End-User submittion), and a **Sign in** link.
Currently, the **Community section has been disabled.*



If an Agent is logged in when on this site, the **Submit a request** link will not appear.

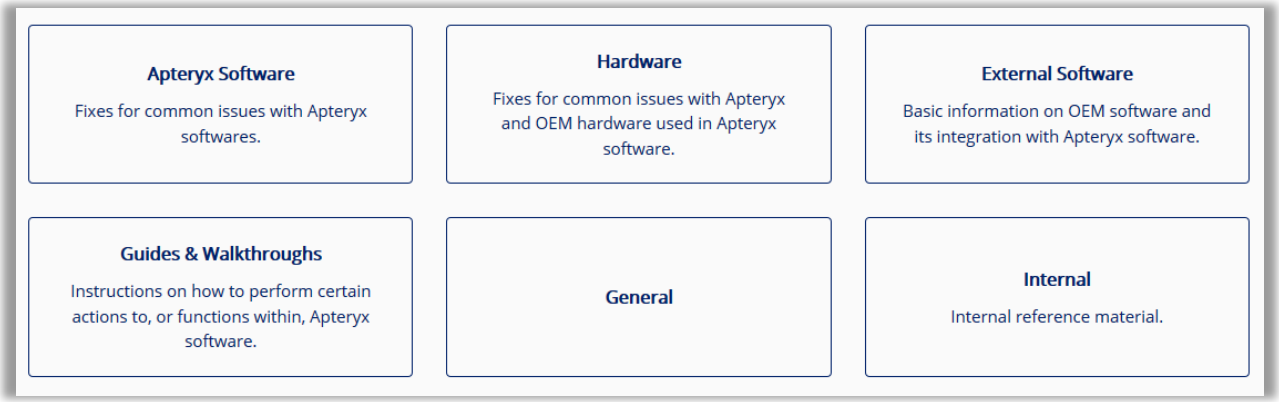


The Search

With the search, a visitor to this site can type in an issue and find related articles. This is done via Keywords, and is constantly being updated to account for misspellings, alternate word choices, and user feedback. Best practice is to stick with specifics (Hardware manufacturers, hardware models, software names, etc…). Simple is best.

The Articles

The Articles are separated into Sections and then Categories. The main page has the Sections, and each section is separated into a few Categories, further separated into the individual articles.



Any Article with a lock icon 🔒 next to it is Internal only. Internal articles are not visible to End-Users and can only be seen by Agents.