

**7 Ways
BetterCloud's IT
team uses Zendesk
to increase
productivity.**

Contents

Introduction

01

Use triggers to automatically CC the whole IT team if a ticket is high priority

02

Use tags to auto-assign tickets based on form conditions

03

Use macros to save time

04

Pipe ticket updates into Slack channels

05

Create automated reminders

06

Use internal notes on a ticket

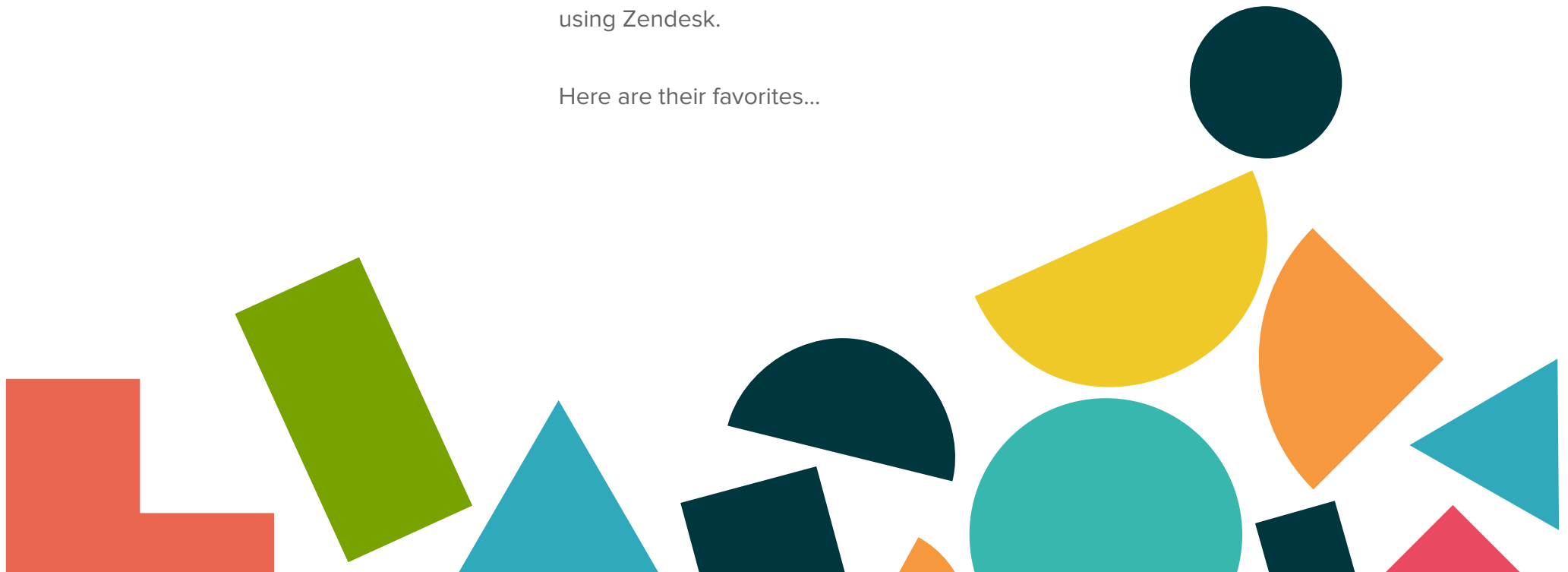
07

Use problems to link similar incidents and manage them together

Introduction

There are some creative ways to leverage the power of automation (and other Zendesk features) that can help your IT team work much more efficiently and save time. We asked our IT and Technical Support teams here at BetterCloud to share a few tips for how IT professionals can increase their productivity using Zendesk.

Here are their favorites...



NUMBER ONE

1. Use triggers to automatically CC the whole IT team if a ticket is high priority.

Say someone in your organization submits an urgent ticket. Rather than having it only go to the usual IT ticket agent(s), it's a good idea to get more eyes on it so that it can be resolved promptly.

Using Zendesk's triggers feature, you can automatically CC the entire IT team (or a select group of people, depending on the size of your IT department) if a ticket has a

Trigger title

Meet **all** of the following conditions:

Ticket: Form IT General Support

Add condition

Meet **any** of the following conditions:

Ticket: Priority High

Ticket: Priority Urgent

Add condition

Perform these actions:

Ticket: Add CC

Ticket: Add CC

Add action

Update

Submit

“high priority” or “urgent” status. Triggers combine conditions and actions to create “if” and “then” statements, and these triggers run immediately after tickets are created and updated.

This way, other members of your IT team can jump in and help if the ticket agent is stuck in a meeting or otherwise tied up. This tip is a great way to ensure urgent tickets are solved swiftly.

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NUMBER TWO

2. Use tags to auto-assign tickets based on form conditions.

Tags are words (or combinations of words) that you can use to add more context to tickets. “Basically, it’s metadata attached to a ticket,” says Tim Burke, Director of IT at BetterCloud.

You can use tags in your triggers to automatically assign tickets to the right department. Burke automatically adds tags like “Wifi” or “Printer” so that he can report on which services or products are causing the most reported issues.

For example, if the form is for [IT, Ops, etc.], and the employee is in the [New York City, Atlanta, etc.] office, then add those tags to the ticket to assist in searching, filtering, and reporting. This is a simple tip, but it’s tremendously helpful for assigning tickets correctly and keeping them organized.

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Trigger title

Assign ATL IT Tasks to Nick

Meet **all** of the following conditions:

Ticket: Form IT General Support

Ticket: Is...

Ticket: Office Atlanta

Add condition

Meet **any** of the following conditions:

-- Click to select condition.--

Add condition

Perform these actions:

Ticket: Group

Ticket: IT Request Type

Ticket: Type

Ticket: Assignee

Ticket: Add CC

Ticket: Set tags

This action will remove existing tags and replace with the tags you specify (use spaces to separate individual tags)

Add action

For more advanced users, tags can be used with external services to route and manage tickets in some really interesting ways. Mike Stone, Director of Technical Support at BetterCloud, created a round robin-style assignment script that uses tags heavily. “It was one thing that we were missing in Zendesk, but with tags and some Google Apps Script, we were able to put it together very quickly on our own,” says Stone. “This way, we can spread the load out throughout our agents and keep things balanced.”

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NUMBER THREE

3. Use macros to save time.

Hate typing out the same message again and again? Then macros are your best friend. “Macros are basically like Canned Responses in Gmail,” explains Burke. They contain actions, like updates to ticket properties or ticket comments, and they’re a quick, easy way to streamline your workflow.

For example, Burke’s team uses a macro that sends the ticket requester a template message that their request has been

has been resolved, along with instructions on how to reopen the ticket if needed. The macro then also automatically sets the ticket status to solved. Macros can even add or remove tags, change form values, or re-assign or escalate tickets, but if you have a smaller IT team, you may only need to use a few macros. “As we grow, I’m sure our usage and complexity of our macros will scale with our growth,” Burke said.

The screenshot shows the configuration page for a macro named "Close-Resolved". It includes fields for the macro name, description, and available agents. Below these are the "Actions" section, which allows defining actions to be performed on the ticket, such as setting the status to "Solved", assigning to the current user, and adding a comment. A preview of the macro's output is shown at the bottom, displaying a message to the customer: "Thanks for your request. It looks like everything was resolved- if not, please reply to this ticket to re-open it."

< Close-Resolved

Macro name*
Close-Resolved

Description
Enter an optional description

Available for
All agents

Actions
Add actions to add a comment to the ticket or update the ticket's field values.

Perform the following actions

Status	Solved
Assignee	{current user}
Group	{current user's groups}
Comment/description	

Thanks for your request. It looks like everything was resolved- if not, please reply to this ticket to re-open it.

[View available placeholders](#)

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NUMBER FOUR

4. Pipe ticket updates into Slack channels

Zendesk ticket is opened or changes status, the appropriate IT personnel are notified by a message in Slack. No more switching between apps!

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The image displays two screenshots from the Zendesk automation interface. The left screenshot shows a workflow configuration for a new Zendesk ticket. It features a 'TRIGGER' step '1. New Ticket' and an 'ACTION' step '2. Send Channel Message'. The trigger is configured with 'Zendesk' as the app, 'New Ticket' as the event, and 'Bettercloud IT & ops' as the channel. The action is configured with 'Slack' as the app, 'Send Channel Message' as the event, and 'BetterCloud Proudtion SLACK' as the channel. The 'Set Up Template' option is highlighted. The right screenshot shows the 'Set up Slack Channel Message' configuration screen. It includes a 'Channel (required)' dropdown set to 'operations', a 'Message Text (required)' field with a template: 'Ticket [Step 1 Id] - < [Step 1 Public Url] | * [Step 1 Ticket Subject] *> from [Step 1 Requester Name]. [Step 1 Priority] Priority, assigned to [Step 1 Assignee Name] [Step 1 Public Url]', a 'Send as a bot?' toggle set to 'no', and a 'Bot Name (optional)' field set to 'zenbot'.

NUMBER FIVE

5. Create automated reminders

Perhaps you've been waiting for information from an employee so you can close a ticket, but you've forgotten about it. If a ticket has been languishing in an open or pending state for a while, you can set a reminder and create an automation to notify IT of the reminder. Burke's team sets the reminder to fire after seven days, but you can customize this to your liking. Reminders are a helpful nudge and ensure that nothing slips through the cracks.

Automation title

Meet **all** of the following conditions:Ticket: Status On-holdTicket: Hours since update 168

Add condition

Meet **any** of the following conditions:

Add condition

[Preview match for the conditions above](#)

Perform these actions:

Notifications: Email user

Email subject:

Email body:

This is to notify you that ticket {{ticket.title}} hasn't been updated in 7 days and is still either Open or Pending.

{{ticket.description}}

Ticket status-{{ticket.status}}

Priority-{{ticket.priority}}

Due Date-{{ticket.due_date}}

Comments-
{{ticket.comments_formatted}}[View available placeholders >](#)

Add action

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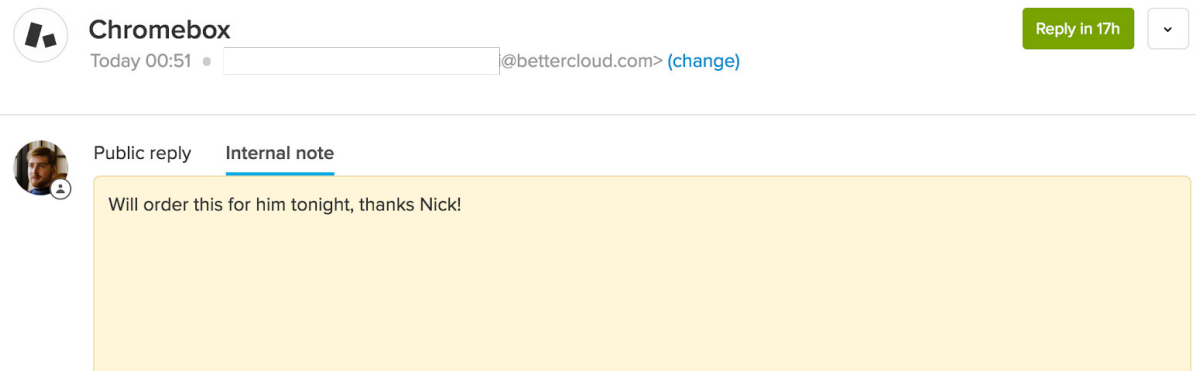
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NUMBER SIX

6. Use internal notes on a ticket.

Internal notes are a great way to add additional information or context if you're passing a ticket request to another person on your IT team. These comments are private, so only your team sees them, and they're an easy way to facilitate information sharing. "The internal notes are really useful when you're handing off requests and bouncing between a lot of people," says Burke.

"If you have information, it doesn't hurt to pop it into an internal note for your colleagues. It could help them out, and it doesn't clutter up what the end user sees," adds Nick Church, IT Specialist at BetterCloud.

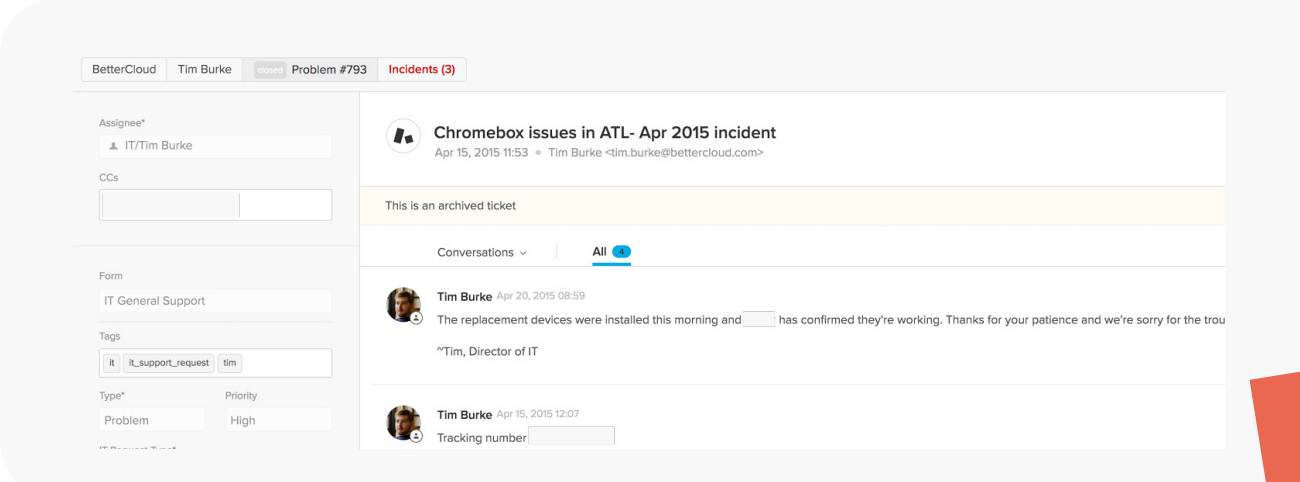


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NUMBER SEVEN

7. Use problems to link similar incidents

For widespread issues like outages, updates gone wrong, or major problems with an application, there's no need to notify and update each individual ticket (incident). If all of the incidents are related, link them together in a problem, and use that problem to update users of resolution time, workaround steps, or other information. This lets you communicate a message to even thousands of users at once.



The screenshot displays a Zendesk ticket interface. At the top, it shows the user 'Tim Burke' and a 'Problem #793' with 'Incidents (3)' linked to it. The main content area shows a ticket titled 'Chromebox issues in ATL- Apr 2015 incident' from 'Apr 15, 2015 11:53' by 'Tim Burke <tim.burke@bettercloud.com>'. A yellow banner indicates 'This is an archived ticket'. Below this, there are conversation threads. The first thread shows a message from 'Tim Burke' dated 'Apr 20, 2015 08:59' stating: 'The replacement devices were installed this morning and [redacted] has confirmed they're working. Thanks for your patience and we're sorry for the trou...'. The second thread shows a message from 'Tim Burke' dated 'Apr 15, 2015 12:07' with the text 'Tracking number [redacted]'. On the left side of the interface, there are fields for 'Assignee*' (IT/Tim Burke), 'CCs', 'Form' (IT General Support), 'Tags' (it, it_support_request, tim), and 'Type*' (Problem) and 'Priority' (High).

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