How to handle Zendesk support desk

In this Tutorial we are going to learn How to use zendesk & manage it.

What is zendesk?: It is a support desk to address queries of cutomers.

Why we use zendesk? What is the purpose?:

We use zendesk to provide support to our customers and resolve their issues.

Prerequisites:

 Lastpass,zendesk link https://engageleads.zendesk.com/.

Process:

After login in zendesk

you will be at dashboard area refer below screenshot

The highlighted box in screenshot contains tickets

If the ticket is new it will be yellow in color

If the ticket you have responded and marked as opened it will be red in color

If the ticket you have responded and marked as pending it will be blue in color

Try responding open ticket at first priority then new tickets.

and if the ticket is not attended for many days that ticket should be at highest priority try to resolve such tickets first.

Always while submitting the ticket you should mark ticket as pending and if the ticket is resolved so you can mark as solved.

Before answering to any ticket please check following things

1.check for product name,paypal address,and all details.

and answer accordingly.

2.sometimes their might be two email id you need to check both the email id while providing access/refunds.

3.you can also refer swipes provide at the end of this documentation.

There macro for following tickets:

1.**Refund** : If the refund ticket is new you can use the macro why refund by modifying according to the product type and requirements if the user still want refund you can proceed with the refund.

2.**Members area access(DAP)** : If the user want DAP access we have macro for it you can use the macro according to the products or it is SAAS based you can use it macro too,if their macro exists.

you need to go to the DAP site or SAAS site and you have to add users in it.

Note: Before giving access to users please check whether he/she had purchased the product or not.

you can give access on one of the email id if their is two different mail id's.

while giving access always take care of their email id which you have used for providing access might be same which you have listed into his/her tickets reply.

or if the user is already in DAP or Sometimes user account get locked and he is not getting access of it ,update his password with the password in the macro and submit the ticket.

How to assign tickets to developer /other agents:

1. For certain ticket which need technical assistance you can use the macro submitting to developer and can assign to respective developer.

For a assigning tickets to agents

refer below screenshot

you can select the name of the agent you want to share ticket with from drop down list and submit as open.

Search ticket:

1.By using search option on top right you can use to search ticket of similar type which is answered previously.

2.you can check what type of tickets generally comes.

Merging tickets

Duplicate tickets from the same requester can be merged into one ticket instead of responding the same inquiries with the same message. Once you have merged tickets to another ticket, one gets closed with a note stating that it has been closed and merged into a ticket number.

Check out the tickets that has the same content.

Open the ticket you would like to merge into another ticket. From the left corner click on the down arrow and choose merge into another ticket.

You can enter a ticket number, select one of the ticket requester's open tickets, or select one of your recently viewed tickets.

When you select a ticket to merge into, you'll be prompted to confirm the merge. You can also edit the merge comments that are added to each ticket and also set whether or not the comments will be public or private using the **Requester can see this comment** option.

The ticket that is merged into another ticket will get closed. A note will then be added to the ticket about the merging.

How to handle refunds/ Reduce refunds

- When handling refunds, it is best to offer support first or why refund macro before refunding. More often than not, clients refund when they do not understand a product or when they feel that they are not getting the help that they get. It would also be helpful to create macros for refunds.
- Previous products can be offered instead of refunding. In some cases customers doesn't have technical knowledge so offering to install the product to their site is a magic that entice them to choose a product instead of a refund.
- Most clients who ask for refund expect an immediate reply to their ticket so it would be best to include refunds in Zendesk triggers.
- There's no harm in asking the reason why they don't want to utilize the product. In this manner ideas can be collected and might be useful for future product updates.

1. Quick and soothing gratification

a. take your customers immediately to a Thank You page (and perhaps even include a video literally telling them, "Thank you!")

b. email the customer a summary of their order within 15 seconds of the user clicking "Purchase."

2. Make sure all materials, tutorials/videos needed in implementing the product are available and working

properly.

3. Introduce a feedback forum where customers send their feedback about your products and their feature requests. Then on a weekly basis look at the top features and adjust product development to meet customers' needs. Giving a bonus for the top feature requests will also encourage customers to share more what's on their mind.

4. Actively interact with your customers. Respond to every single comment or forum topic. It shows that you do care about your community and will lower your refund rate.

5. Respond to inquiries and or give assistance at the soonest possible time to customers who contact support desk. Never mark a ticket as solved if there is no resolution given to the inquiry yet. Making a ticket as solved after initial response gives an impression to customers that you are not happy/willing to help them. In short it gives a bad image of your customer support.

6. Instead of giving your customers everything at once, stage-out value over time. **I**f you were planning on giving your customers five bonuses, give them a bonus every quarter instead. Best not to announce additional bonuses but just send it to them later as a surprise gift (a week after launch or promo).

7. Before giving refunds try offering assistance in setting up the product in order for the customers to have a clearer view of how it really looks like once it's up and running.

8. If you have previous products you can offer them any in exchange of a refund.

Bulk updating tickets

To save time responding the same issue of multiple tickets use the bulk update. To do that open one of your views and select the tickets you want to update. You can pick and choose the tickets you want to update or select the entire list by clicking the check box at the top left of the view.

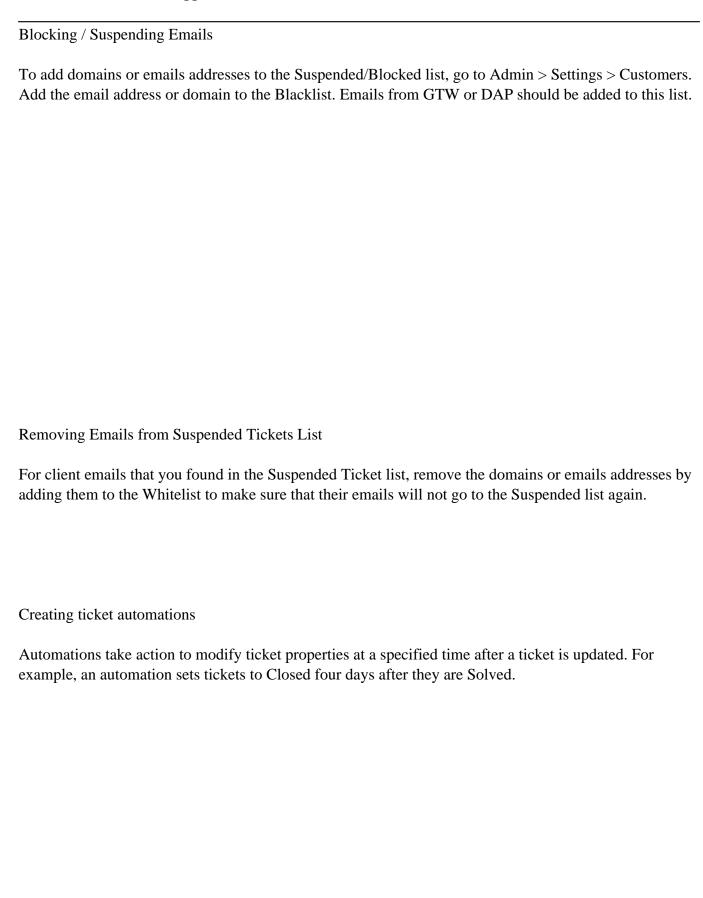After clicking the Edit tickets button, a pop-up page where you type in your response or use a macro in response to customers' concern then click the submit button.

Macros

A macro is a prepared response or action that agents use to respond to support requests. Macros are very helpful in answering tickets. You can create templates of generic responses for common issues that people email about.

To add a Macro, go to the Zendesk Admin Panel, under Manage, click Macros.

This is a great way for support staff to leave notes about the ticket for the next support staff who would be handling the ticket. To do this, instead of clicking on Public reply, click on Internal note instead. This will post the internal note within the ticket, only visible to the Zendesk agents/admins.

Suspended tickets

You can find the Suspended tickets by clicking on the views tab on the upper left side of the Zendesk panel. This is where Zendesk places those tickets which are categorized as spam. However, there are instances when regular emails are also transferred here so it is still important to this area every day.

To manage suspended tickets, tick the box to highlight all the emails and click on the option Delete 30 tickets. This will delete all the emails in bulk.

To recover a client's email that was mixed up in the suspended tickets, click on the email and choose the option Recover Automatically. The email will be transferred to Zendesk home.

Marking tickets as Spam

Tickets can be marked as spam and suspend the requester at the same time. Tickets marked as spam are permanently deleted but suspended users can be unsuspended if necessary.

Open the ticket you wanted to mark as spam.

Click the Ticket options menu in the upper right, then select **Mark as spam** from the dropdown.

Click **Immediately mark as spam** to confirm that you want to continue.

Blocking / Suspending Emails

To add domains or emails addresses to the Suspended/Blocked list, go to Admin > Settings > Customers. Add the email address or domain to the Blacklist. Emails from GTW or DAP should be added to this list.

Removing Emails from Suspended Tickets List

For client emails that you found in the Suspended Ticket list, remove the domains or emails addresses by adding them to the Whitelist to make sure that their emails will not go to the Suspended list again.

Creating ticket automations

Automations take action to modify ticket properties at a specified time after a ticket is updated. For example, an automation sets tickets to Closed four days after they are Solved.

Testimonials

Zendesk is also a great place to find testimonials from clients.

Support: When to escalate tickets?

If support is receiving tickets of the same issue from different clients, it may be a good time to investigate on it further. Ask clients for screenshots and how they got the errors.

Before escalating a ticket, try searching for possible solution and if the client gets back and said it did not resolve the issue then it's time to escalate it to a group. If possible add an internal note of a short description of the issue and what suggested solution was given. This will save time for the other team to know what is going on.

Enhancement requests

- One of the request types in the ticket form submitted by clients through Zendesk Help Center is about Enhancement requests. This gives us an insight of what features clients want in a certain product. This would be useful for products that we plan to re-launch.
- To view Enhancement requests and all the other tags, click on Admin > Manage > Tags
- This will show the Popular Tags along with how many times they were used
- Click on a tag to view all the tickets that used that tag

Swipes/Macros

ACCESS DETAILS SWIPE

Hi <client>,

You can access the <product> here: <link>

Email:

Password:

You can find the bonuses here: <link>

You can view the training videos here: <link>

Feel free to contact us if you have questions.

Regards,

<name>

Support Team

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Hello {{Requester}}

Thank you for contacting support desk about your concern.

Here are your login details:

Link:

Username:

Password:

Please find the video tutorials and bonuses in the members area.

Check out also our FAQ about the product in here: (link to the product category FAQ)

For further inquiries or assistance with our products please don't hesitate to contact us.

Good luck and thank you for your continued support!

Cheers,

{{assignee}}

Support Team

NOTE: Most requests for access details occur at the start of a launch. Aside from that, clients also ask about their bonuses and training. It would be best to include these when sending out access details so clients won't have to email back support to ask about them.

REFUND SWIPE

Hi <client>,

We regret that you are requesting for a refund for <product>. We really put a lot of work into this product as you can tell. Were you able to look around and install the product? May we see one or two to see if we can help you improve them?

It saddens us that you feel like this product did not meet your expectations. In fact, we've had many people who have told us the opposite; and that it was much more than they expected!

Would you want to take a look at some of our products instead of refunding? We are willing to offer <product 1>(sales page link) and <product 2> (sales page link). If you are interested, we can give you access to these products. But if you still prefer to refund, please reply to this email and confirm your refund request. Thanks!

Regards,

<name>

Support Team

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Hello {{ticket.requester.first_name}},

Thank you for contacting support desk. Sad to know you are requesting a refund for this awesome product.

We are aware it is mentioned there are no questions asked when requesting for a refund but jut want to ask one (1) question. Aside from (REASON MENTIONED), is there any other reason why you don't want to utilize the product? We personally guarantee this product will work for you! This product has a 30 day money back guarantee so would you like to try using the product first and see if this works for you. We also have a team who are more than happy to assist you whenever the need arise.

If not would you like to grab any (INSERT NUMBER OF PRODUCTS) of our high ticket products instead of a refund. Here is the link to our product so you can check what each one does: (LINK TO THE PRODUCTS SITE) For whatever products you choose we will deliver you the main and it's OTOs.

Please let us know what you think and we'll go ahead with it.

Cheers,

{{current_user.first_name}}

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Hello {{ticket.requester.first_name}},

Thank you for contacting support desk.

Checking back our record the product that you are requesting a refund for is made more than 30 days ago. It is mentioned in our salespage that we give refunds within 30 days prior to purchase. Sadly we are unable to give you the refund.

Is there anything we can help you with to make this product work for you? Please let us know what assistance you need so the team can help you out. If possible send us screenshots of issues you are getting to give us a clearer vision your concern and will be able to give you the right solution.

Good luck and more success to you!

Cheers,

{{current_user.first_name}}

NOTE: In rare cases some customers ask for a refund after the refund period. Take note to check date of purchase before responding to a refund request otherwise you will be refunding products that is not already valid for refund.

REFER TO DEVELOPER SWIPE

Hi <client>,

Thank you for telling us about the errors you got. We would appreciate it if you can send us screenshots so we can investigate this further. We will be forwarding this issue to our developers. We shall keep you posted on its progress.

Regards,

<name>

Support Team

MISSED PRODUCTS SWIPE

Hi <client>,

Thank you for your interest in <product>. We just wanted to inform you that this product is no longer open to the public. However, we do value our clients so we will make an exception for you. We are willing to give you this product at a discounted price of $—. All you need to do is to click on this Paypal link to purchase <link>. After that, please forward the purchase receipt you will receive from Paypal and forward it to us so we can give you access details to the product.

Thank you for your continued support!

Regards,

<name>

Support Team

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Hello {{ticket.requester.first_name}},

Thank you for contacting support desk.

Unfortunately the offer is closed in the system and we cannot reopen it for individual orders because that would be unfair to those who purchased prior to the deadline. But since you are one of our valued customers my superior agreed to allow you to purchase the product but only as a package at [please choose the package price (Main – $177; other products- $97)]. The package will include the main + OTOs/Dsell.

If you agree with this please paypal your payment to payments@<company-name>.com then send us a copy of your transaction so we will manually create your access.

Cheers,

{{current_user.first_name}}

LOCKED PRODUCTS/CAN'T ACCESS MEMBERS AREA SWIPE

Hi <client>,

We apologize for the inconvenience. Our database shows that you have purchased <product 1> and <product 2>. We have updated your access to the Member's Area. Please try to login again.

You can access your products here:

<link>

<link>

Kindly try it out and let us know if problem persists.

Regards,

<name>

Support Team

UNSUBSCRIBE FROM EMAILS SWIPE

Hi <client>,

We're sorry about the numerous emails. We were excited about our new product that's coming out and we wanted you to be the first to know! If you do not wish to receive emails, you can find the link to unsubscribe at the bottom of the email. Please refer to this screenshot for a guide on how to unsubscribing: <link>

Regards,

<name>

Support Team

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Hello

We apologize for the numerous emails. We are excited to let you know about [our new product or one of or affiliate product] which we know you can use to grow your business so we wanted you to be the first to know. But if you do not wish to receive further emails, you can unsubscribe using the link at the bottom of each email. In the future if you would like to opt-in our list again just ping us and we'll be glad to add you in again.

Thank you for contacting support and have a great week!

Cheers,

CLIENT FEEDBACK SWIPE

Hi <client>,

Thank you for the feedback, we appreciate it. Your input will help us improve our products and services to be better. If there is anything that we can help you with, do not hesitate to contact us. Have a great day!

Regards,

<name>

Support Team

NOTE: Be quick to thank a customer whenever a feedback (positive or negative) is received. Let them know we value every comment/feedback because it helps us improve the quality of our products and services. The same when a ticket is rated. Avoid waiting for the ticket to get closed and creating a follow-up ticket just to say thank you. It is a good work ethic to be thankful in everyway.

LOGIN DETAILS WITH UPSELL SWIPE

Hi <client>,

You can access the <product> here: <link>

Email:

Password:

We just wanted to inform you that the upgrades are only available at a discounted price until <date>. Do not miss your chance to grab this great deal! If you are interested, you can check the upgrade here – <link>

Regards,

<name>

Support Team

REFUND AFTER 30 DAYS SWIPE

Hi <client>,

We regret to inform you that we cannot refund your <product> purchase. Our records show that you purchased last <date>. This means that your purchase is no longer within our 30-day money-back guarantee. If there is anything else we can help you with, please let us know.

Regards,

<name>

Support Team

Testing or What can go wrong?

1.Instead of submiting ticket as pending one can submit it as open /closed.

always submit ticket pending if the ticket is not resolved .

and submit it as open when you have asked him we will get back to you , so when you get leads regarding that ticket you can reply again to it.

and if the ticket is resolved you can submit as solved

2.Before giving access to users please check whether he/she had purchased the product or not.

you can give access on one of the email id if their is two different mail id's.

while giving access always take care of their email id which you have used for providing access might be same which you have listed into his/her tickets reply.

or if the user is already in DAP or Sometimes user account get locked and he is not getting access of it ,update his password with the password in the macro and submit the ticket.

3.Always check the product name then answer it accordingly and specially at the time of giving refund.

check the email id if same it is ok if there are two check for both and provide refund for the asked

product.

Created by Rahul