Zendesk is our communication platform for communication with customers and for task based communication within our company.

All phone calls and texts from customers come through Zendesk and are handled by the WOW Center. Zendesk also houses our chat platform and when an email is sent to wow@whatchefswant.com, it is sent to Zendesk.

To access Zendesk, go to Zendesk.com. Click on Log in. Zendesk will first ask for our domain name; enter whatchefswant. The next screen will ask for you login and password. Your login is your email address and your password will be sent to you upon creation of your Zendesk account. If you are having problems logging in, please send an email to zendesksupport@whatchefswant.com and one of the admins will be able to help.

Zendesk is a ticketing platform. Think of tickets as anything task related: special orders, bin checks, report requests, product questions, etc. Instead of emails to large groups, tickets follow a linear path. You can only send a ticket to one group at a time and the ticket must then be passed from one group to another.

Let's take a look at the platform. Upon logging in to Zendesk, you will see this screen:

Focusing on the left side of the screen:

The home icon is the home screen. The icon below is the Views screen. **This is where you will want to spend most of your time while in Zendesk as you will be able to see the tickets that need your attention.** Below that icon is the Reports screen and the bottom is the Settings screen.

Creating a Ticket

Let's begin by creating a ticket. Once you have clicked on the Views screen,

Click on + Add to create a ticket.
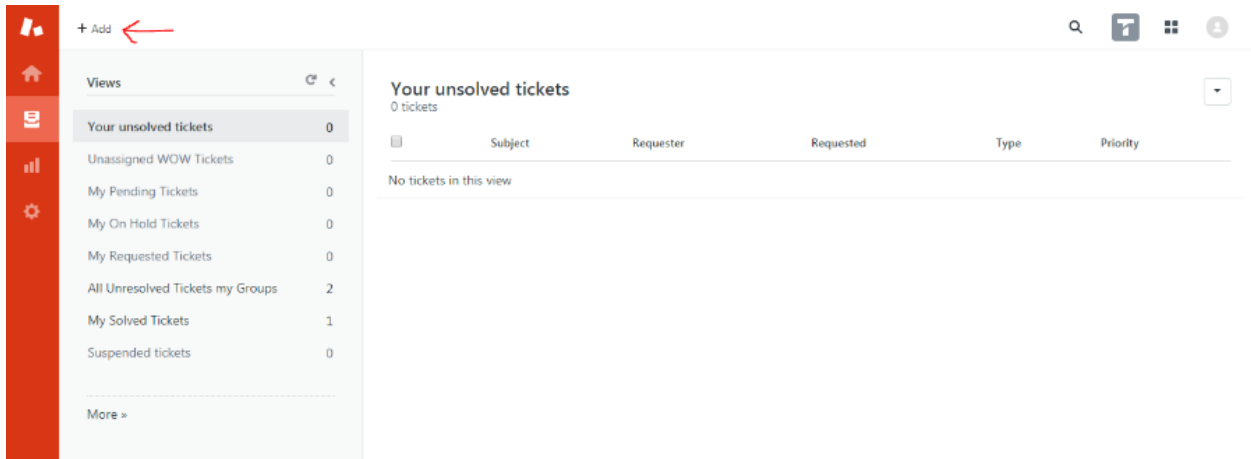
Let's create a ticket using the following scenario.

Lynnette's Restaurant is concerned with the price of their iceberg lettuce. You need information from the Price Alert team to give an answer to this customer.

Upon clicking on + Add at the top left of the screen, a new ticket opens.
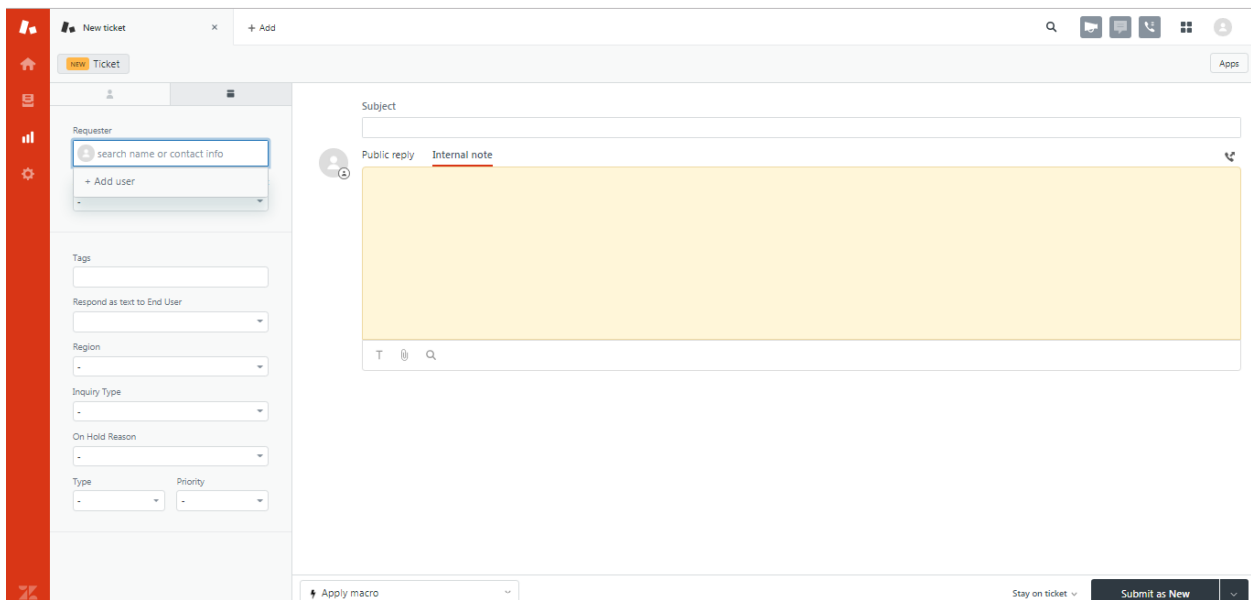
The Requester is the person the ticket is From. You can submit tickets yourself or on behalf of a user in Zendesk.

Quick note: Customer contacts in Produce Pro that are tagged CF are imported into Zendesk daily.

If you want the requester to be you, simply leave that field blank by hitting Tab.
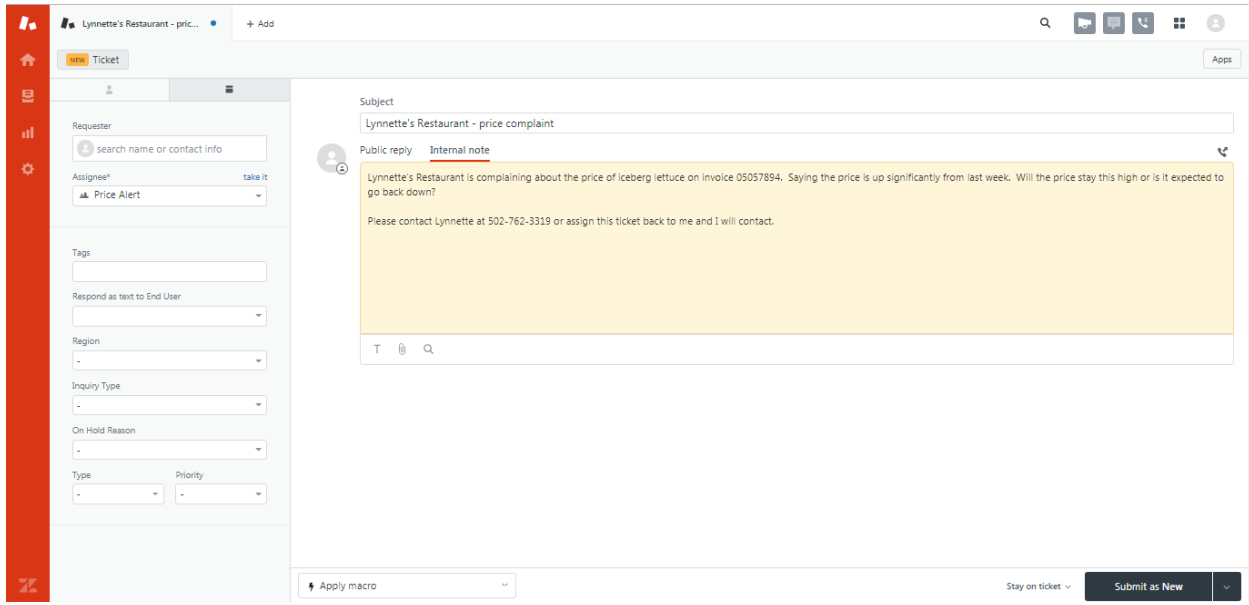
The Assignee is group the ticket is To.

You can start typing a group or click on the down arrow to see a list of available groups.
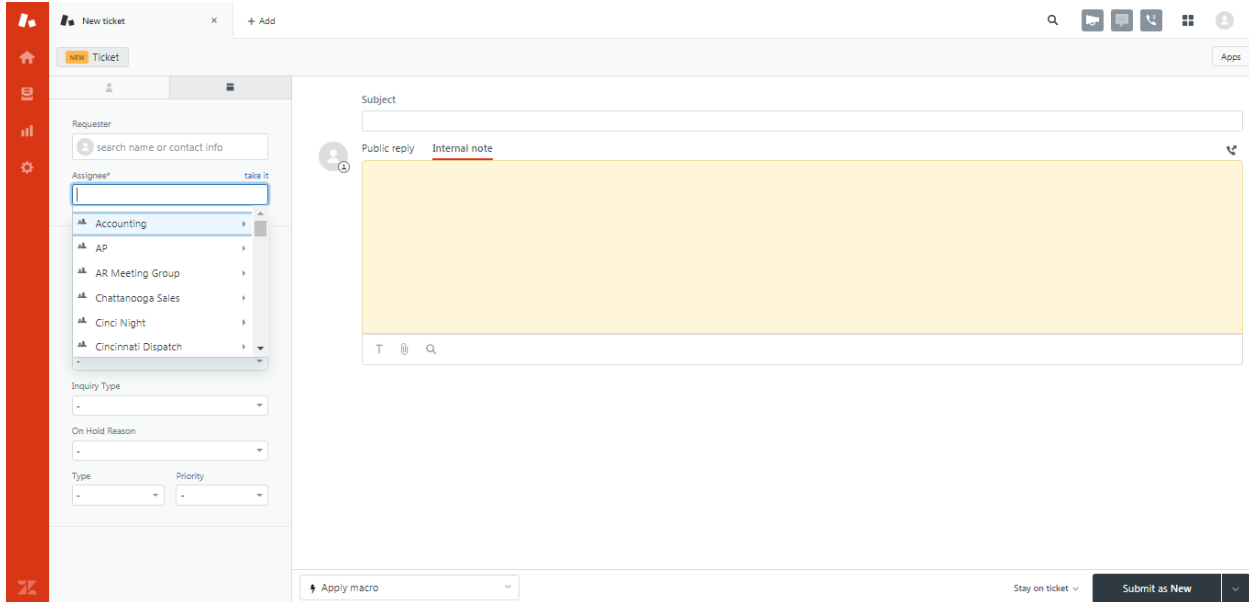
When I started typing "Price" you can see the groups and members of those groups listed. By default, assign to the group so all members can see and the appropriate person can take action on the ticket.
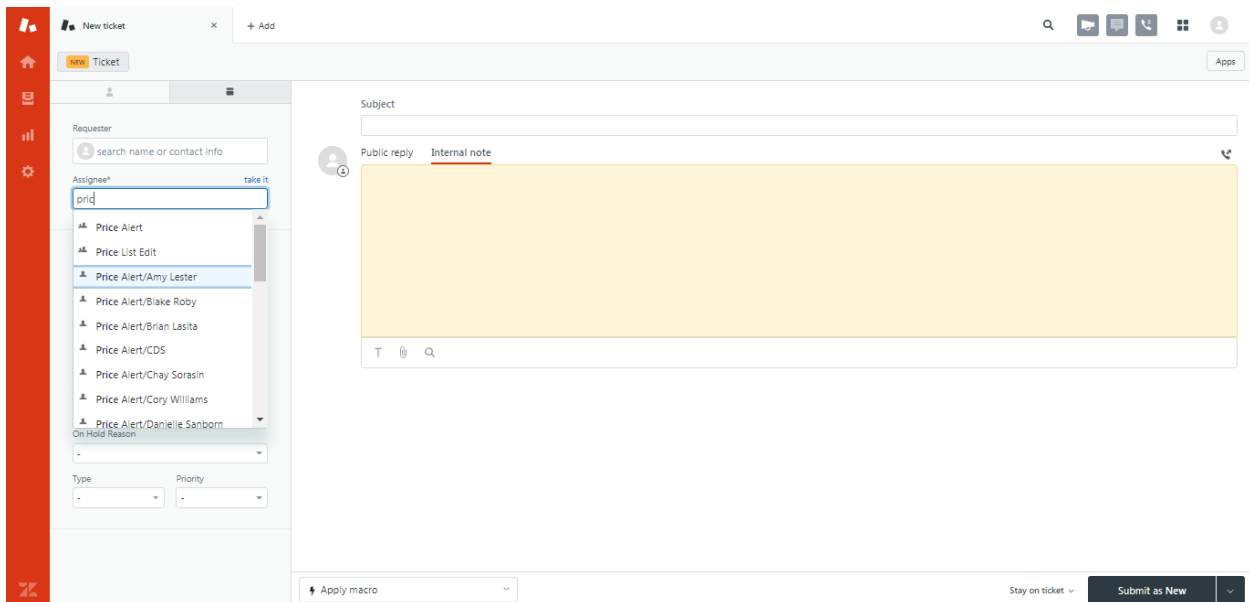

Enter a subject and the body of the request.

Enter as much information as you can in the body of the ticket. You can attach a picture by clicking on the paper clip in the lower left corner or you can copy and paste pictures into the body of the ticket.

By default, we have set Zendesk to all Internal Notes. See the tabs at the top of the body of the ticket. If you switch to Public Reply, an email will be sent to the Requester with the information on the ticket that was on any Public Reply. The email will not include any of the internal notes.

Next, submit the ticket as New by clicking on the Submit as New button in the lower right corner.
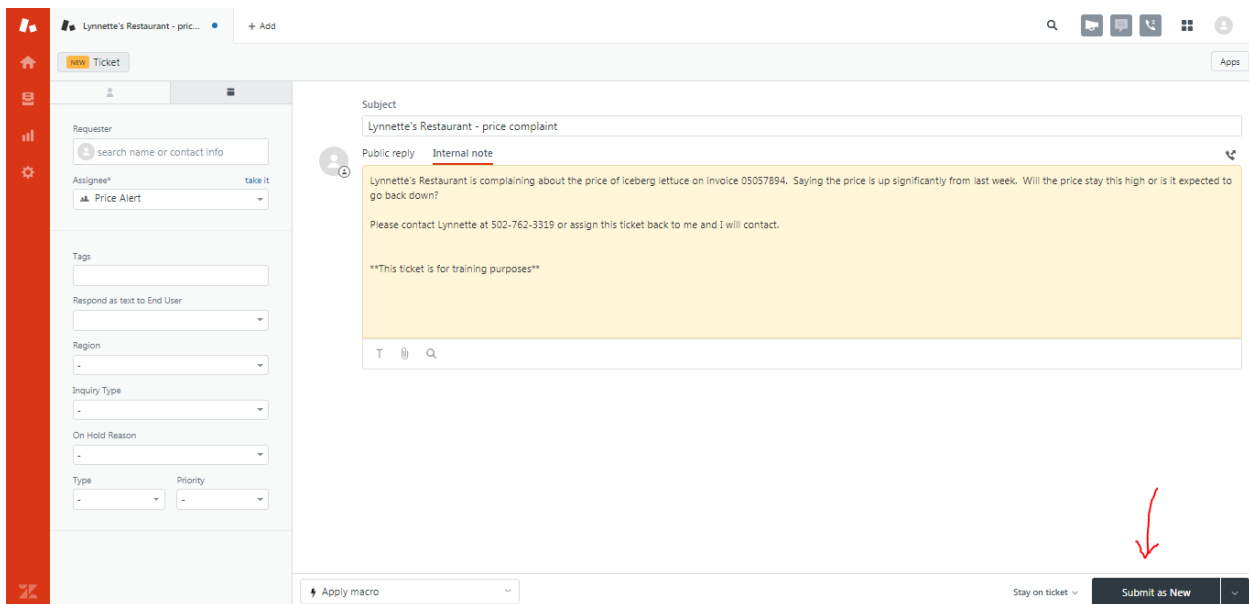

This ticket will now show up in the Unassigned Price Alert View. We will learn more about views later in this tutorial.

Let's interact with this ticket. A member of the Price Alert team will respond to this ticket.
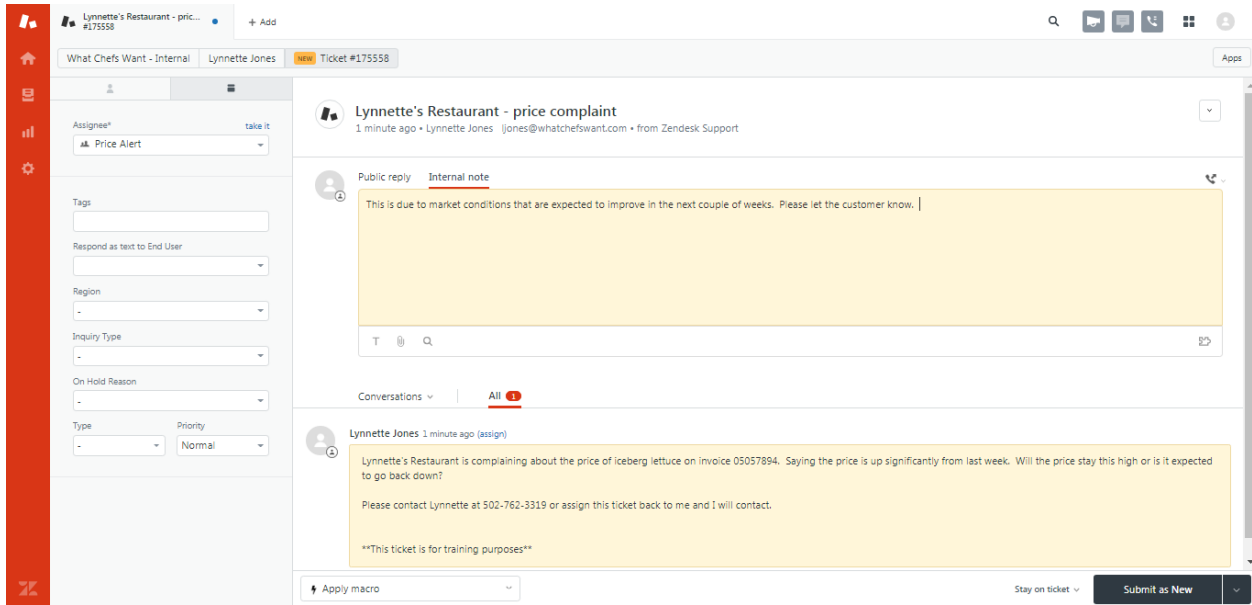
Next, they would assign the ticket back to you. This is a very important step. Simply submitting the ticket will not respond to the person who requested the ticket. A ticket must be re-assigned to the appropriate agent or group. Do this by clicking on the Assignee box; either start typing the name of the agent or group you would like to assign this ticket to or use the drop down to search.

Agents can be members of multiple groups. Assign to the appropriate agent/group combo. In this case, I'm assigning to Lynnette Jones as a member of the WOW Secondary Group.
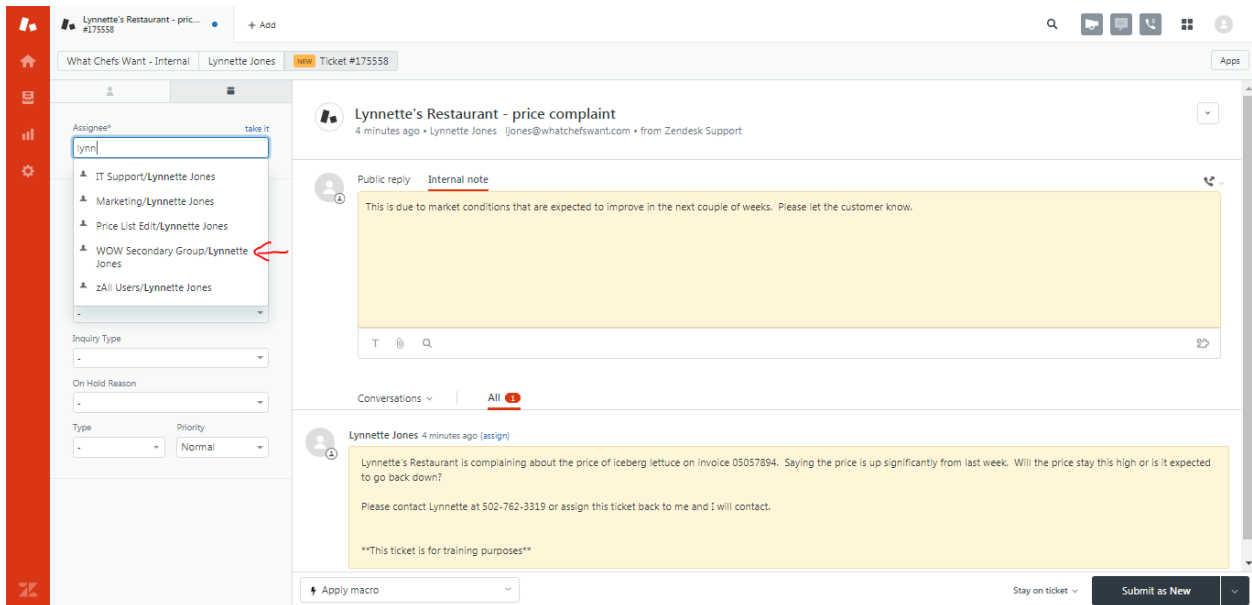
Next, decide how this ticket needs to be submitted.

Here's a description of each status.

[N] New – Ticket has been created

⊙ Open – Ticket has been submitted in open status for further action

**P** Pending – This ticket is awaiting information from the customer

H On Hold – Ticket is awaiting information from a third party, not a member of our company or a customer. For example, we could be awaiting information from a vendor for a special order product

S Solved – Ticket has been solved. All parties have been notified. Tickets can be reopened in solved status. Tickets will remain in solved status for 4 days before moving to closed status

C Closed – Ticket is closed and cannot be reopened.
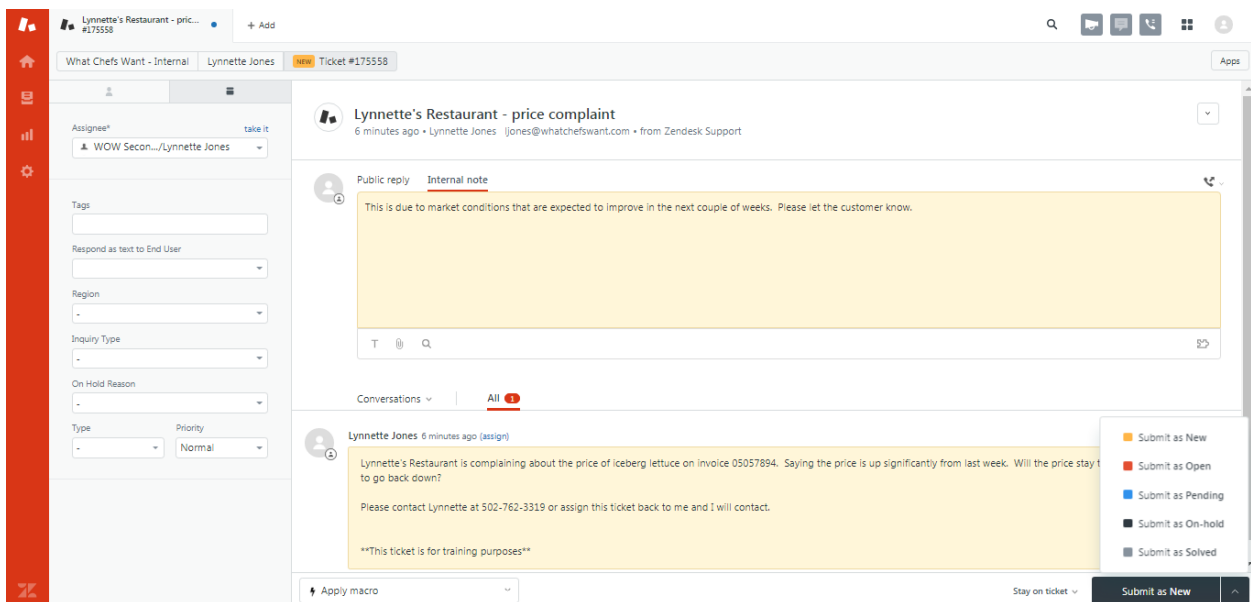
After submitting, this ticket will now show up in Lynnette's Your Unsolved Tickets view. It will be up to Lynnette to decide if the ticket can be solved.

About Views

When a ticket has been assigned to a group of which you are a member, it will show in the Unassigned (insert group here) Tickets view.

Your view will differ from the view shown based on what groups you are in. All users have the following views:

Your unsolved tickets – tickets that have been assigned to you and have not been solved

Daily Feed – this is a place for informational tickets that need to be seen by many groups within the company. Examples of Daily Feed tickets are product shortages, market conditions, ongoing issues with a particular customer, etc. This view is meant to serve as a communication tool between teams that may not see each other because of the shifts or regions in which they work.

Unassigned All Users Tickets – Tickets assigned to the zAll Users group that have not been taken by an agent

All Unresolved Tickets in my Groups – Any ticket that has not been solved and is assigned to a group of which you are a part.

My Requested Tickets – All tickets in which you are the requester. This view shows tickets that are solved as well as New, Open, Pending, On-Hold or Solved.

My Solved Tickets – All tickets assigned to you that are solved

My Pending Tickets – All tickets assigned to you that are in Pending status
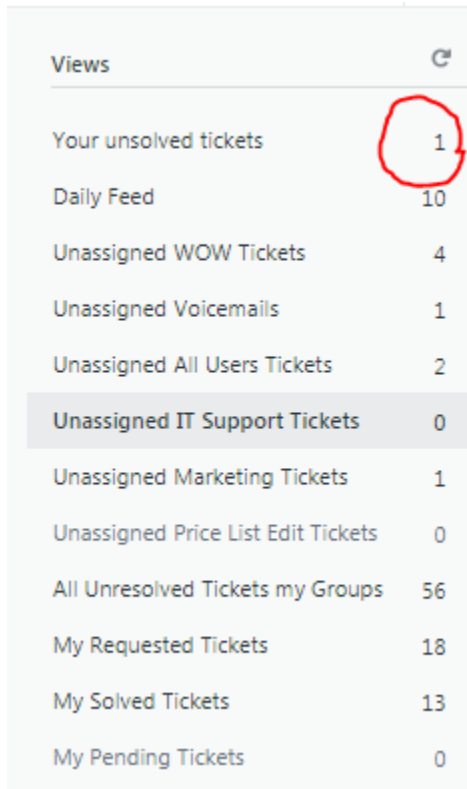
<mark>(Note: All tickets move from Solved status to Closed status after 4 days. A Closed ticket cannot be reopened, but can be searched for anytime)</mark>

You can also create personal views. Please contact Lynnette Jones at ljones@whatchefswant.com or send a Zendesk ticket and she will show you how. There are endless possibilities for views you would like to see.

Interacting with a Ticket

This section focuses on how to "Take a Ticket", "Re-assign a Ticket" and the differences in submit types.
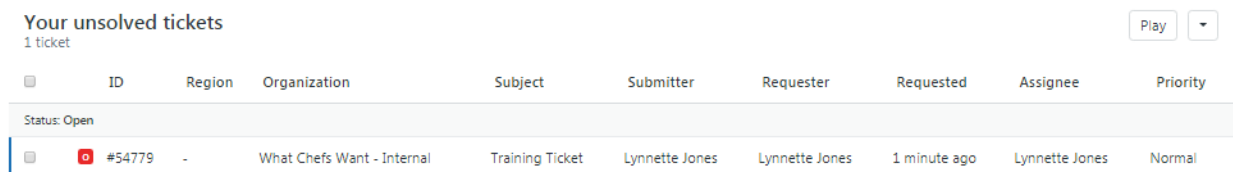
See how there is a ticket in the "Your unsolved tickets" view?

This means there is a ticket assigned to you that needs action. To open this view, click on it.

If there were more than one ticket assigned to you, they would all show up in this view.

This view shows the Status, Region, Organization, Subject, Submitter, Requester, When Requested, Assignee and Priorty of the ticket.

Region – refers to the region the customer is located. Louisville, Nashville, Columbus, etc.

Organization – This is the restaurant or organization the requester of this ticket is a part of.

Subject – This is the subject of the ticket

Submitter – This can be the Zendesk agent within What Chefs Want who submitted the ticket or the end user who submitted the ticket.

Requester – The person who requested the ticket. This can be a contact at a restaurant or a Zendesk agent.

Requested – This shows when the ticket was requested

Assignee – The agent currently assigned the ticket

Priority – All tickets default to Normal, but can be changed to Urgent, High or Low.

If there is a little eye to the left of the status, it means someone else is also viewing this ticket.

Click on the ticket to view it.

When you answer a ticket, you need to do 3 very important steps.

1. Type your reply. Zendesk defaults to Internal note as the reply option, meaning this note will just be seen by What Chefs Want Zendesk agents. You can also choose Public reply and reply directly to the customer via email.

Training Ticket
Today 11:58 am • Lynnette Jones ljones@whatchefswant.com

Public reply   Internal note

Got it.

T   📎   Q

Conversations ⌄ | All 1

Lynnette Jones Today 11:58 am (assign)

This ticket is for training purposes only.

2. Assign the ticket to the group or individual who needs to see it. If you do not re-assign the
   ticket, it will remain in your view. Click on the Assignee and either scroll or start typing the
   group or individual who needs to see this ticket next.

3. Submit the ticket. In the bottom right corner, click on the arrow to bring up the submit types. These correspond with the status types described earlier. Most of the time, tickets will be submitted either in Open or Solved status.

How to use Search

Anything is searchable in Zendesk. Every ticket can be searched for and viewed by any What Chefs Want Zendesk agent.

The search tool is in the top right corner of Zendesk. Click on the magnifying glass to start searching.
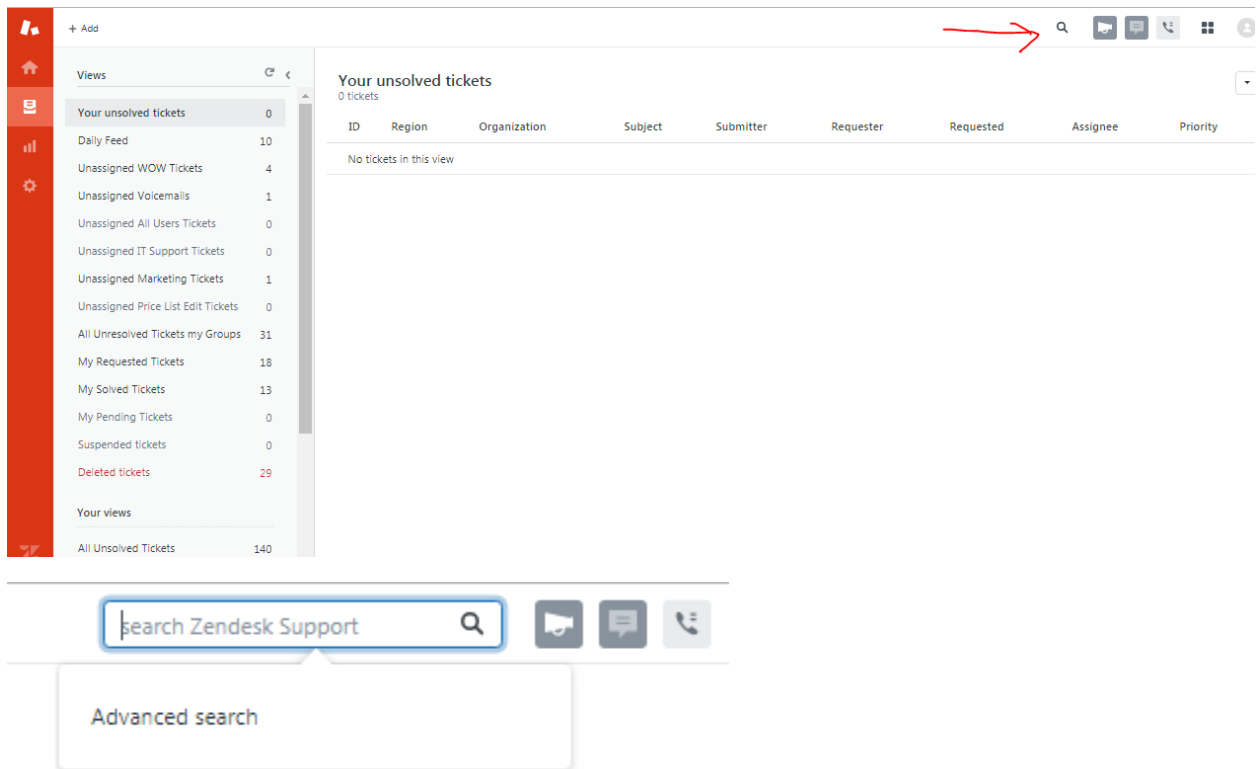
Let's search Eddie Merlot

There are 97 tickets that are associated with Eddie Merlot. These could be requested by Eddie Merlot or have the text "Eddie Merlot" in the body of the ticket or subject. You will also see across the top there are 8 users and 2 organizations with Eddie Merlot. Let's click on Organization.

We have 2 Eddie Merlots in Zendesk. This is important as we have many customers that have multiple locations (O'Charleys, Applebee's, etc.) To see the tickets that are associated with Eddie Merlots Columbus, click on it.

Now you have narrowed down the search to see tickets that have been requested by Eddie Merlot Columbus or have Eddie Merlots Columbus in the subject line or body of the ticket.

You can also search for a product, user, agent, etc. and you can use the advanced search functions to narrow down your search.