



help center

tutorials

agent guide

ask support

training

 **Phase One: Learn Zendesk**

Get to know Zendesk

- Understand groups and organizations
- Understand users and roles
- Zendesk University Training

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sign up

 **Phase Two: Basic Set-Up**

Add your support channels

- Decide which channels to add
 - Email
 - Twitter
 - Chat
 - Facebook
 - Voice
 - Widget
 - API
 - Mobile SDK

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Build your Help Center

- Create your Help Center
- Customize your Help Center
- Add content

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Manage your users

- Add end users, agents, and admins
- Add organizations
- Add groups

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Phase Three: Advanced Customization

Customize your workflow

- Create and use tags
- Create views
- Create event-based triggers
- Create time-based automations
- Create macros
- Create custom fields
- Create custom forms*
- Add apps from the marketplace

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Brand Your Zendesk

- Customize your Zendesk Support URL
- Customize your support email address

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Secure your Zendesk

- User access and login
- Create an open Zendesk
- Create a closed Zendesk
- Create a restricted Zendesk
- SSO Options
- Authentication methods

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Insights Reporting

- What is Insights?
- Monitor activity and agent performance
- Customize your reports

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Phase Four: Review and Launch!

*Feature is available on Enterprise accounts only.