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The ultimate Certified Zendesk Support Admin cheatsheet

Preparing for the Certified Zendesk Support Admin can be hard. It is easier though if your foundation is solid. This cheatsheet provides the key concepts you need to master before you attempt the exam.

It is meant to be used as a companion document to our guide on How to pass the Certified Zendesk Support Admin exam the first time.

Business rules are how you automate workflows for your support team. There are many different types, sometimes with overlapping functionality. Knowing when you use which one is key for passing the exam and for a solid foundation of your Zendesk instance.

Business Rules

Type	Use when	Runs when	Example	Considerations
Trigger	You want to automate an action in response to a ticket being modified	A ticket is created or updated, and the conditions of the trigger are met.	When the ticket status is set to Pending, automatically send an email to the requester.	The order in which the triggers are defined matters. Check out some best practices for ordering your triggers
Automation	You want to automate an action based on elapsed-time and certain attributes of a ticket	Automations run every hour	If a ticket hasn't been updated in 2 days, send an email to the ticket assignee	Automations don't always run at the tip of the hour. Use "greater than" or "less than" filters instead of exact time filters
Macro	You want agents to save clicks and keystrokes by allowing them to choose when to automate certain actions on a ticket	Selected by the agent in the ticket interface	Create a "Escalate to Tier 2" macro that automatically changes the group to Tier 2 and adds a public comment to the customer	The "Notify Targets" action is not available in Macros. If you need to notify a target with a macro, have the macro add a tag to the ticket. Then, create a trigger that notifies the target when the tag is added.
SLA	You want to enforce SLAs for a ticket, given certain conditions	A ticket is created or updated and only after triggers have run	You want to enforce the "first reply time" on customers whose organization has the VIP tag	The order of the SLA matters. If you have conflicting SLA criteria, add the most restrictive or specific one at the top. This will prevent tickets from being assigned to the wrong SLA.

Deciding who can log tickets in Zendesk is a critical security concern. Do you need an open Zendesk or a closed one? Or perhaps something in between?

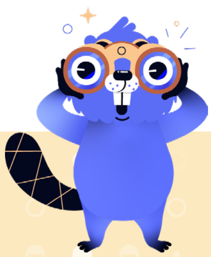
Zendesk End User Access

Access Type	Who can submit tickets	How to configure it	When to use it
Open	Anyone	Enable **`Anybody can submit tickets`** under People > End Users.	You sell products and provide support to the general public. A user submits a support request and a new user account is created in Zendesk.
Restricted	Users with allowed email addresses or email domains	Enable **`Anybody can submit tickets and Ask users to register`** under People > End Users Alternatively, use the allow and blocklist to specify which domains can register.	You provide support for the a smaller audience and you want them to be authenticated to your Help Center before they can submit a ticket. Common for B2B.
Closed	Users created by a Zendesk admin	Disable **`Anybody can submit tickets`** and create the end users manually.	You only want to support users you know. Commonly used when using Zendesk for internal IT.

Ticket fields and tags are at the heart of Zendesk configuration. In some ways, they are very similar, specially in their ability to be used as criteria for different business rules. That doesn't not mean they can be used interchangeably.

Ticket fields vs Tags

Functionality	Tags	Fields
Use when	You want to **tag** the ticket with certain keywords that can later be used for automating a business process or filtering a view. It's not meant to represent an attribute of the ticket that the end user can modify or interact with	You want to define the **properties** of a ticket, for example the "Escalation Status" or "Escalation Manager". Use when you need the field to adhere to a predefined data type (text, number, date, etc.) It can be used to describe properties of the ticket for both the end users and internal agents
Predefined data types (text, number, date, dropdown, etc.)	No	Yes
Can be used as conditions in Triggers, Automations and SLAs	Yes	Yes
Can be set by Triggers, Automations and Macros	Yes	Yes
Can be removed by Triggers, Automations and Macros	Yes	Yes – by setting the value to blank
Can be viewed and set by end users	No	Yes – if configured at the field-level
Are automatically copied from organizations to tickets	Yes	No
Can be added to the Comment body created by a Trigger, Automation or Macro	Yes – using `{{ticket.tags}}`	Yes – using `{{ticket.ticket_field_id}}`
You can find where it is being used in other areas of your Zendesk configuration	Yes – with the Rule Analysis feature	Only for Triggers by using trigger search



Find where your Zendesk tags and fields are used

one click away!