# Zammad

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# Manage

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# CHAPTER 1

Users

Depending on your organization's IT capabilities, users can be managed individually or in bulk, or even synchronized with third-party directory services.

Fig. 1: The simplest way to manage users is directly in the Admin Panel.

Learn more about managing users...

## 1.1 Managing Users via the Admin Panel

The "Users" panel provides tools to manually manage user accounts.

Creating and editing users

Fig. 2: Click the New User button to open the New User dialog, or click on an existing user to edit.

Hint: See Reference Guide: User Details for help with the New/Edit User dialog.

**Deleting users** 

Fig. 3: Use the Actions menu to open the Delete User dialog.

### Warning: Deleting a customer destroys all their associated tickets!

To learn more, see Data Privacy.

### Filtering the user list

Fig. 4: Use the **Search for users** bar and the **Roles** buttons to filter the list. You may search by name, email, or any other user attribute.

### Note: Known bug

The search list displays up to 50 users, from newest to oldest. That means that if there are more than 50 results, the user you're searching for might not be shown.

This is a known bug with a fix underway.

### Taking over a user's session

Fig. 5: Use the Actions menu to View from user's perspective.

The **View from user's perspective** button allows you to "hijack" another user's session and confirm firsthand what they can and can't do (or see) when they're logged in.

This is especially useful when you need to verify that you've set up custom permissions correctly for non-admin users.

Danger: With great power comes with great responsibility.

This feature is not a simulation; entering this mode will boot the user from their session, and any actions you take (responding to tickets, changing passwords, *logging hours worked*) will actually be performed from the user's account.

(On the other hand, if the user logs back in, you'll be booted, too.)

**Hint:** When finished, use the **Back to my view** button at the top of the page. If you try to exit by logging out, the "hijacked" user session will be restored when you log back in.

# **1.2 Managing Users via CSV Import**

If your organization has information about customers (or personnel) already stored in a directory system that can export to CSV, you can batch-import them into Zammad in just three steps.

**Hint:** CSV import provides one-off batch processing of user records. For persistent, automated user synchronization, consider integration with a third-party directory system like *LDAP / Active Directory* or *Exchange*.

### 1.2.1 Step 1: Inspect the Sample .csv

Use the link at the bottom of the CSV import dialog ("Example CSV file for download") to see how Zammad expects you to format your user data.

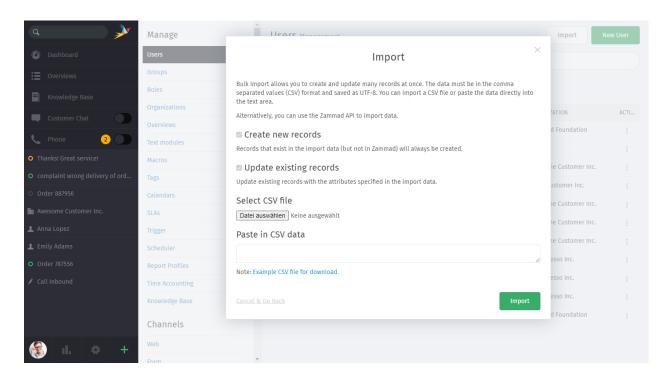


Fig. 6: Use the Import button to open the CSV import dialog.

### 1.2.2 Step 2: Export Your User Data to .csv

Prepare your .csv file according to the format found in Step 1 above. Note that:

- the id attribute (column) should be left blank or removed entirely;
- the firstname and lastname attributes are required; and
- any others may be safely omitted as long as each row has the same number of fields (commas).

For instance:

```
login,firstname,lastname,email,web,active
jdoe,"John","Doe",jdoe@example.com,"https://zammad.com",true
mmore,"Madeline","Moore",mmore@example.net,"",false
```

## 1.2.3 Step 3: Import Your .csv to Zammad

Once your raw user data has been submitted, Zammad will perform a test run to compute the number of affected records:

### Note: How does it know when to create new records and when to update?

Records are updated when the imported data contains an email or login that matches an existing user account.

Click Yes, start real import to proceed. (If you're importing a lot of records, be patient—it may take a minute.)

That's it!

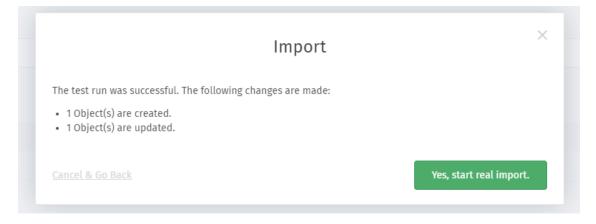


Fig. 7: CSV import always begins with a preview / test run.

# **1.3 LDAP / Active Directory**

With our LDAP integration, you can easily use existing authentication systems without having to update more than one source. Also, e.g. password policies are ensured by your LDAP source - Zammad will always contact your LDAP server for authentications.

**Note:** The LDAP sync is one way: LDAP => Zammad. Changes to your users inside of Zammad might be overwritten by the LDAP Sync.

To configure LDAP integration, simply go to System -> Integrations -> LDAP in the admin panel. Press "change" and follow the wizard for adding the needed LDAP information to Zammad. On the last step Zammad will ask you for your wanted LDAP mapping. By default, Zammad only Maps Login, First- and Lastname. Technically you can map any LDAP object to a Zammad user object (this also works for Custom Objects!).

On this wizard step, you can also define the wanted LDAP-group-to-Zammad-role mapping.

Note: Please note that nested groups are currently not supported by Zammad.

If needed, you can also change the user filter for your LDAP query. The option "Users without assigned LDAP groups" will by default assign the *customer* role (default sign-up role) to any LDAP user, that doesn't match to the above role mapping. After pressing Continue, Zammad will check if the configuration is okay. You can then enable LDAP and start your first sync. The sync will then run hourly - if you need to change mappings, you can change the configuration at any time.

		User		
LDAP ATTRIBUTE		ZAMMAD ATTRIBUTE		ACTION
givenname (e.g., All)	~	Firstname	~	👕 Remove
sn (e.g., Exudos)	$\sim$	Lastname	~	👕 Remove
samaccountname (e.g., Admi	i ~	Login	~	👕 Remove
	~		~	👕 Remove
+ Add				
		Roles		
		Roles		
LDAP GROUP		Roles		ACTION
LDAP GROUP cn=zammad-group,ou=zamm	1 ~		~	ACTION
	1 🗸	ZAMMAD ROLE	~	
cn=zammad-group,ou=zamm	1 🗸	ZAMMAD ROLE	~	
cn=zammad-group,ou=zamm + Add	N ↔	ZAMMAD ROLE Agent	~	
cn=zammad-group,ou=zamm + Add	VALUE	ZAMMAD ROLE Agent		The move

**Note:** You can use user filters to limit the search results Zammad gets. Also, you can hide deactivated Active Directory accounts (the users will be set to inactive within Zammad). You can find further information for Active Directory Filters at the Website from Microsoft.

After the sync has finished, you can find the new LDAP users under "Users". Zammad integrates them just normal users, the difference is the login name.

۹ 🏄	Manage	Users Management				Import New User
Ø Dashboard	Users	Q Search for users				
Cverviews	Groups					
Customer Chat	Roles	Roles: Admin Agent Cust				
📞 Phone 3 🕥	Organizations	LOGIN	FIRSTNAME	LASTNAME	ORGANIZATION	ACTION
• Thanks! Great service!	Overviews	ashe	Elizabeth	Caledonia		
<ul> <li>complaint wrong delivery of ord</li> </ul>	Text modules	reaper	Gabriel	Reyes		
Order 887956	Macros	mccree	Jesse	McCree		
L Chrispresso Inc.	Tags	Junkrat	Jamison	Fawkes		
🔔 Anna Lopez	Calendars	olivia@example.com	Olivia	Ross		
L Emily Adams	SLAs	david@example.com	David	Bell		
• Order 787556	Trigger	ryan@example.com	Ryan	Parker	Good Customer Inc.	
	Scheduler	emily@example.com	Emily	Adams	Awesome Customer Inc.	
	Report Profiles	samuel@example.com	Samuel	Lee	Awesome Customer Inc.	
	Time Accounting	anna@example.com	Anna	Lopez	Awesome Customer Inc.	
	Channels	emma@chrispresso.com	Emma	Taylor	Chrispresso Inc.	
	Web	jacob@chrispresso.com	Jacob	Smith	Chrispresso Inc.	
	Form	chris@chrispresso.com	Christopher	Miller	Chrispresso Inc.	
	Email	nicole.braun@zammad.org	Nicole	Braun	Zammad Foundation	
	SMS					
	Chat					
	Twitter					
🏀 ii 🏩 +	Facebook					

# 1.4 Exchange

With our Exchange integration, you can easily use existing address books without having to update more than one source.

**Note:** The Exchange sync is one way: Exchange => Zammad. Changes to your users inside of Zammad might be overwritten by the Exchange Sync.

To configure Exchange integration, simply go to the System -> Integrations -> Exchange in the admin panel. Press "change" and follow the wizard for adding the needed Exchange information to Zammad. On the last two step Zammad will ask you for the address book(s) and your wanted Attribute mapping. By default, Zammad only Maps email address, First- and Lastname. Technically you can map any Exchange object to a Zammad user object (this also works for Custom Objects!).

**Note:** Please refrain from syncing all addresses, as the results may not be what you expect (Exchange collects huge amounts of addresses). A central address book of your company to sync makes more sense, as you can ensure that Zammad gets only the data you need and want.

After pressing Continue, Zammad will check if the configuration is okay. You can then enable LDAP and start your first sync. The sync will then run hourly - if you need to change mappings or the address book(s), you can change the configuration at any time.

۹ 🗼	Channels ^	C Exchange		
Dashboard	Web	This service enables Zammad to connect with your Exchange server.		
	Form			
Overviews	Email	Last sync		
🔍 Customer Chat	SMS	11/21/2018 20:06 - 11/21/2018 20:06		
📞 Phone 3 🌑	Chat	<ul> <li>Exchange user to Zammad user (2/2):</li> <li>Users: 0 created, 1 updated, 1 untouched, 0 skipped, 0 failed</li> </ul>		
• Thanks! Great service!	Twitter	<ul> <li>Exchange folders:</li> <li>My Contacts: 0 created, 1 updated, 1 untouched, 0 failed</li> </ul>		
• complaint wrong delivery of ord	Facebook	Start new		
Order 887956	Telegram			
🖿 Chrispresso Inc.	Settings	Settings		
1 Anna Lopez	Branding	NAME	VALUE	
🚨 Emily Adams	System	Endpoint	https://	/EWS/Exchange.asmx
Order 787556	Security	User		
	Ticket	Password		
	System	Manadaa		
	-	Mapping Folders		
	Subscription	FOLDER		
	Integrations	My Contacts		
	API			
	Objects	User		
	Translations	EXCHANGE		ZAMMAD
	Maintenance	given_name		firstname
	Monitoring	surname		lastname
	Packages	email_addresses.emailaddress1		email
	Sessions			
🛞 il. 🔅 🕂	Version	Change		

After the sync has finished, you can find the new Exchange contacts under "Users". Zammad integrates them just normal users.

**Note:** In some cases you might see unique IDs as "Login" instead of the email address. This is normal and doesn't affect the login or email mapping for that entry.

۹ 🏄	Manage	Users Management				Import	New U
🗿 Dashboard	Users	Q. Search for users					
Overviews	Groups						
Customer Chat	Roles	Roles: Admin Agent Custon	mer				
Phone <u>3</u>	Organizations	LOGIN	FIRSTNAME	LASTNAME	ORGANIZATION	ACTION	
Thanks! Great service!	Overviews	e6297f300f990c9c780161e8aff377dbc7	Martin	Edenhofer			
complaint wrong delivery of ord	Text modules	1e1143724d6e97df7b1c78df8ad2b7384	Marcel	Herrguth			
Order 887956	Macros	olivia@example.com	Olivia	Ross			
Chrispresso Inc.	Tags	david@example.com	David	Bell			
Anna Lopez	Calendars	ryan@example.com	Ryan	Parker	Good Customer Inc.		
Emily Adams	SLAs	emily@example.com	Emily	Adams	Awesome Customer Inc.		
Order 787556	Trigger	samuel@example.com	Samuel	Lee	Awesome Customer Inc.		
01461767550	Scheduler	anna@example.com	Anna	Lopez	Awesome Customer Inc.		
	Report Profiles	emma@chrispresso.com	Emma	Taylor	Chrispresso Inc.		
	Time Accounting	jacob@chrispresso.com	Jacob	Smith	Chrispresso Inc.		
	Channels	chris@chrispresso.com	Christopher	Miller	Chrispresso Inc.		
	Web	nicole.braun@zammad.org	Nicole	Braun	Zammad Foundation		
	Form						
	Email						
	SMS						
	Chat						
	Twitter						
🛞 il. 🔅 +	Facebook						

### Note: Customers get their own user accounts, too?

Yes! Unlike OTRS, Zammad needs to store accounts for everyone who communicates through the system.

Why? It helps us do things like show all tickets from a certain customer.

How? Zammad checks the sender of every incoming message at every inbox it monitors, and if it doesn't recognize

the address, poof-new customer account!

(Your customers never need to set a password. Of course, they can if they want to, but the account will be there even if they never use it.)

## 1.5 Reference Guide: User Details

Most of the attributes you can set on user accounts are self-explanatory. The ones that aren't are described below.

	Edit: User
FIRSTNAME *	LASTNAME *
Emily	Adams
EMAIL	ORGANIZATION
emily@example.com	Awesome Customer Inc.
WEB	PHONE
	0061 2 1234 7777
MOBILE	FAX

Fig. 8: User details can be set in the New/Edit User dialog.

### Note: Admins aren't the only ones who can change these settings.

In most cases, agents can, too (using the new ticket dialog, search bar or the ticket pane).

Login A user's email and login may differ, but either one can be used to sign in.

Note:				
LOGIN	FIRSTNAME	LASTNAME	ORGANIZATION	ACTION
olivia@example.com	Olivia	Ross		:
david@example.com	David	Bell		:
ryan@example.com	Ryan	Parker	Good Customer Inc.	:
emily.adams	Emily	Adams	Awesome Customer Inc.	:
samuel@example.com	Samuel	Lee	Awesome Customer Inc.	:

Fig. 9: User logins are not shown in the New/Edit User dialog, but they are visible from the user overview.

This attribute **cannot** be set via the Admin Panel. Instead, use the Zammad console, the REST API, or *CSV import*.

Password Yes, administrators really do have the power to change other users' passwords.

(Agents do not, though.)

**Organization** *Organizations* are a way to group customers together (usually, members of the same company). This allows you to do things like view all tickets for that company or set up special *Triggers* that fire only for those customers.

Hint: You can't assign a customer to an organization that doesn't exist yet.

To add one, go to Manage > Organizations in the Admin Panel.

**VIP** This flag is a way for your team to indicate high-status customers. Just as with organizations, you can set up special *Triggers*, *Scheduler* jobs, *SLAs*, and *Overviews* just for VIPs.

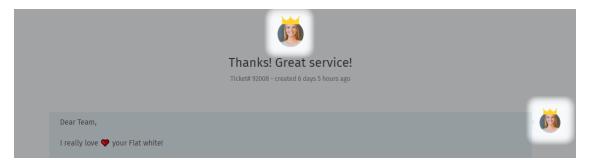


Fig. 10: VIPs are displayed with a crown above their avatars.

Note Notes are visible to all staff members, including agents.

### Hint: Are you using the Note field to keep track of your own "custom" user attributes?

Wish you could add your own fields to the New/Edit User dialog?

You can! To learn more, see Objects.

Active Disabling this flag is a soft alternative to deleting a user. So what's the difference?

- 1. There is no way to restore a deleted user; inactive users can be reactivated at any time.
- 2. When a user is deleted, all their associated tickets are lost, as well; deactivating a user keeps all associated tickets intact.
- 3. Inactive users still appear in search results:

Permissions Under this heading, you can manage two separate (but related) user details:

- 1. *Roles* dictate what users can do in the system. If you need to grant someone privileges to edit the knowledge base or access part of the admin panel, roles are the answer.
- 2. *Group Access Levels* dictate which tickets an agent can work with. If someone's not receiving notifications for incoming tickets or can't be assigned a ticket, group access levels are likely to blame.

### Hint: Huh? I don't see the group access table...

۹ 🏄			<b>^</b>	Templates
Ø Dashboard	New Ticket			No template created yet.
Overviews	🏏 Received Call 🛛 😢 Outbound Call	Send Email		With templates you can pre-fil attributes.
Knowledge Base	TITLE *			Choose attributes and then sa
Customer Chat				them as a new template. Save new template
Phone 2	CUSTOMER *			
Thanks! Great service!	example	~		
complaint wrong delivery of ord	🔏 John Doe	inactive		
Order 887956	David Bell - Awesome Customer Inc.			
Awesome Customer Inc.	🔔 Olivia Ross			
Anna Lopez	Ryan Parker - Good Customer Inc.			
Emily Adams	Emily Adams - Awesome Customer Inc.			
Order 787556	Samuel Lee - Awesome Customer Inc.			
Call Inbound	Anna Lopez - Awesome Customer Inc.  Awesome Customer Inc 4 People			
	Good Customer Inc 1 People	>		
	+ Create new Customer			
🔬   11.   02.   +	TAGS			
<b>W</b>			-	

Fig. 11: A slashed-out icon indicates an inactive user. In other cases, inactive users are greyed out.

PERMISSIONS	ERMISSIONS						
□ Admin To configure your	Admin To configure your system.						
Agent     To work on Tickets.							
Customer People who creat	e Tickets	ask for hel	p.				
GROUP	READ	CREATE	CHANGE	OVERVIEW	FULL		
HR					V		
Management							
Marketing							
Sales							

Fig. 12: **Top:** A user's roles decide what kinds of actions they can perform and which *groups* they belong to. **Bottom:** Group assignments can alternately be set on a per-user basis.

The group access table is only visible in **agent profiles**, when there is **more than one active group** in the system.

# CHAPTER 2

## Groups

This is the group management area. From here you can edit existing groups and add new groups.

Groups in Zammad are similar to working groups that deal with different topics within a company. For example, the tickets relevant to the sales department might be available in the *Sales* group, while the tickets for the support department might be available in the *Support* group. These are just examples; how you structure your groups is up to you.

Tickets enter Zammad through various channels (e.g. via email) and are then sorted into these groups. The tickets (cases) are thus made available to the agents responsible for the group. Each ticket can only belong to one group, and you can decide via **access levels** (see below) what access your agents have in each group. For example, you might want set up a group *Management* for confidential tickets; with access levels, you can configure that only a few select agents will have access to these tickets.

For an additional way to categorize tickets, have a look at Tags.

Hint: Zammad users are global to the whole instance. Restriction to specific groups is not possible.

## 2.1 Group Settings

Click on a group to edit it, or click on *New group* to create a new group.

There you can edit the following settings:

- *Name*: choose a name for the group.
- Assignment timeout: the time in minutes after which the ticket's state will revert back to unassigned after the assigned agent hasn't worked on the ticket.
- Follow up possible: configure what happens when a customer replies to a closed ticket:
  - yes: the ticket will be reopened.

- *do not reopen ticket but create new ticket*: the ticket will remain closed, and Zammad will instead create a new ticket for the customer's reply.
- Assign follow ups: configure whether a closed ticket that has been reopened due to a customer's reply should remain assigned to the last agent:
  - yes: the ticket will remain to the last agent who owned it.
  - no: Zammad will unassign the ticket.
- *Email*: choose which email address will be used as the sending address (*From* header) when agents reply to tickets in this group. Email addresses can be configured in Channels  $\rightarrow$  Email  $\rightarrow$  Accounts.
- Signature: choose which signature to use when replying to tickets in this group.
- Note: an internal note about the group that is only visible to people who can access the group management area.
- Active: choose whether the group is enabled or not. Groups cannot be deleted, they can only be set to inactive.

Eventually it should look something like this:

Manage	Groups Manager	nast.	New Group
Users	NAME	Edit: Group $ imes$	
Groups	Incoming	NAME *	
Roles	Sales	Incoming	-
Organizations	Support	ASSIGNMENT TIMEOUT (7)	
Overviews		180	
Text modules		FOLLOW UP POSSIBLE (7)	
Macros		yes 🗸	
Tags		ASSIGN FOLLOW UPS (7)	
Calendars		yes 🗸	
SLAs		EMAIL	
Trigger		Znuny GmbH Helpdesk < @zammad.com> ~	
Scheduler		SIGNATURE	
Report Profiles		DE	
Time Accounting		NOTE	
Channels		Standard Group/Pool for Tickets.	
Web			
Form			
Email		ACTIVE *	
Chat		active ~	
Twitter			
Facebook		Cancel & Go Back Submit	

## 2.2 Group Access Levels

When assigning an agent to a *group*, Zammad gives you fine-grained control over what actions that agent can perform within it:

Within each group, the different access levels allow an agent to...

READ ... view tickets CREATE ... create new tickets CHANGE ... modify existing tickets

GROUP	READ	CREATE	CHANGE	OVERVIEW	FULL
HR					
Management					
Marketing					
Sales					

Fig. 1: Use the group access table to grant per-group privileges.

**OVERVIEW** ... see ticket overviews (but not ticket details)

 $FULL\ \ldots$  all of the above and be assigned / receive notifications for tickets

Note: Full group access also enables notifications for that group's tickets.

## 2.2.1 Setting Access Levels

There are two ways to define an agent's per-group access levels:

1. Directly, in the Edit User dialog

Fig. 2: Simply set your access levels right on the target user.

2. Implicitly, by editing a user's roles

agent Access	to Agent Ti	ckets bas	sed on Grou	up Access		
GROU	JP	READ	CREATE	CHANGE	OVERVIEW	FULL
HR						
Man	agement					
Mark	eting					
Sale	5					

Access to Customer Tickets based on current\_user and organization

Fig. 3: First, set your access levels on a role...

Fig. 4: ... then, add that role to the target user.

Note: We recommend choosing one or the other; things can get confusing if you use both at the same time.

So which one is right for you? *Whichever one is less work*. If you're trying to assign multiple agents to the same group with the same access levels, create a role for them to share—that's what roles are for!

### 2.2.2 Examples

"The Standard Issue"



When a system only has one group, this is the default access level assigned to all agents. Unless you have special needs in mind, this is the way to go.

### "The Supervisor"

GROUP	READ	CREATE	CHANGE	OVERVIEW	FULL
Incoming					

Agents with all permissions except for "full" **cannot be assigned tickets**. Otherwise, their privileges are identical to agents with "full" access. Great for letting other people do the real work.

### "The Meddler"

Agents with "read", "change", and "overview" access can do everything except create tickets or be assigned to them. Great for getting involved in other people's business.

### "The Intern"

Agents with only "create" access can do just that, and nothing else—once they hit **Save**, they'll never see that ticket again. Great for taking phone calls for someone more important than you.

Hint: If the *Group* field does not appear in the ticket view, ensure that:

- · you have created more than one group
- the current user has "change" permissions to more than one group

This is necessary because Zammad automatically hides selection fields with only one option.

GROUP	READ	CREATE	CHANGE	OVERVIEW	FULL
Incoming				V	

GROUP	READ	CREATE	CHANGE	OVERVIEW	FULL
Incoming					

# CHAPTER 3

## Roles

If you're already using Zammad, you'll know that users can be **admins**, **agents**, or **customers**. These are Zammad's built-in roles, and they're the tip of the iceberg of its powerful, flexible, and fine-grained permission system.

۹ 🏄	Manage	Roles Management	New Role
	Users	NAME	
	Groups	Admin	
	Roles	Agent	
Customer Chat	Organizations	Customer	
	Overviews		
Sector Phone 2	Text modules		
	Macros		
	Tags		
	Calendars		
🖬 Awesome Customer Inc.	SLAs		
👤 Anna Lopez	Trigger		
	Scheduler		
	Report Profiles		

Fig. 1: Assign user privileges in the Admin Panel, under Manage > Roles.

### Note: What's New in v3.5

Now, users can have both "agent" and "customer" roles at the same time!

Why would you want this? Agents get *overviews* of all the tickets they're *assigned to* (among other things), while customers get an overview of all the tickets they've *opened*. But some teams use Zammad for both internal and public communication, so their agents need both.

Having both roles also changes what you see in the ticket view, depending on whether you're the "customer" or not.

### Tip: LDAP/Active Directory users:

Syncing your LDAP "groups" to Zammad roles can make access management *way* easier. To learn more, see *LDAP* / *Active Directory*.

## 3.1 What Is a Role?

**tl;dr** Some users can do things others can't (like close a ticket). Users have roles, roles have permissions, and permissions are what make those actions possible.

So what exactly are permissions, then?

	New: Role	
NAME *		
PERMISSIONS * admin Admin Interface		
□ <b>api</b> Manage API		
branding Manage Branding		
🗹 calendar		

Fig. 2: The admin.calendar permission gives you access to the Manage > Calendars admin panel.

Simply put, permissions are names for all the different things users might want to do throughout the system, such as:

chat.agent respond to live chat messages

ticket.agent update tickets

admin.user access the Manage > Users admin panel

knowledge\_base.editor create/edit knowledge base articles

Zammad has dozens of these permissions, which is a lot to keep track of. So instead of saying "This user has permissions A, B, and C", Zammad says "The *agent role* has permissions A, B, and C, and this user is an agent."

This makes creating user accounts for new agents a whole lot simpler, and it also makes it easier to invent a new permission D and say "All existing agents can do *that* now, too."

In short, roles are just collections of permissions that you can give to a user. The built-in admin, agent, and customer roles are enough for many teams, but Zammad gives you the freedom to custom-build your own.

And to do that, you'll need to know what each permission does.

# 3.2 Reference Guide: Permissions

## 3.2.1 Admin Permissions

Note: Permissions are namespaced, which is sort of like having files inside of folders.

The permissions listed on this page all belong to the admin namespace. You can select them individually, or you can just select admin to enable the whole bunch.

	New: Role	×
NAME *		
PERMISSIONS *  admin Admin Interface api Manage API		
□ branding Manage Branding		
☑ calendar Manage Calendar		
channel_chat Manage Channel - Chat		

Fig. 3: Admin permissions are shown at the top of the New Role dialog...

admin.api System > API

admin.branding Settings > Branding

admin.calendar Manage > Calendars (required for SLAs)

admin.channel\_chat Channels > Chat

### Hint: Trying to grant access to send messages in live chats?

Use chat.agent instead.

admin.channel\_email Channels > Email

Note: There is no specific permission for the Google channel yet. This is an open feature request.

admin.channel\_facebook Channels > Facebook

Hint: Trying to grant access to view/update tickets from Facebook?

۹ 🍂	Manage	Users Management			Import	ew User
	Users	Q Search for users				
	Groups					
	Roles	Roles: Admin Ag	gent Customer			
	Organizations	LOGIN	FIRSTNAME	LASTNAME	ORGANIZATION	ACT.
	Overviews	olivia@example.com	Olivia	Ross		
Phone 2	Text modules	david@example.com	David	Bell		
	Macros	ryan@example.com	Ryan	Parker	Good Customer Inc.	
	Tags	emily@example.com	Emily	Adams	Awesome Customer Inc.	:
	Calendars	samuel@example.com	Samuel	Lee	Awesome Customer Inc.	
	SLAs	anna@example.com	Anna	Lopez	Awesome Customer Inc.	
	Trigger	emma@chrispresso.com	n Emma	Taylor	Chrispresso Inc.	
	Scheduler	jacob@chrispresso.com		Smith	Chrispresso Inc.	
	Report Profiles	chris@chrispresso.com	Christopher	Miller	Chrispresso Inc.	
	Time Accounting					
	Knowledge Base	nicole.braun@zammad.c	o Nicole	Braun	Zammad Foundation	
	Channels					
	Web					
	Form					
	Email					
🔊 II. 🔅 +	SMS	*				

Fig. 4: ... and give users access to the pages of the Admin Panel.

That's in Group Access Levels.

admin.channel\_formular Channels > Form

```
admin.channel_sms Channels > SMS
```

admin.channel\_telegram Channels > Telegram

#### Hint: Trying to grant access to view/update tickets from Telegram?

That's in Group Access Levels.

admin.channel\_twitter Channels > Twitter

### Hint: Trying to grant access to view/update tickets from Twitter?

That's in Group Access Levels.

admin.channel\_web Channels > Web

admin.data\_privacy System > Data Privacy

**Danger:** This permission allows users to permanently delete data on the system. Proceed with caution!

admin.group Manage > Groups

admin.integration System > Integrations

admin.knowledge\_base Manage > Knowledge Base

#### Hint: Trying to grant access to read/edit knowledge base articles?

Use knowledge\_base.reader and knowledge\_base.editor instead, and double-check the answer's visibility.

```
admin.macro Manage > Macros
```

Note: In some cases, macros may also require admin.tag.

```
admin.maintenance System > Maintenance
admin.monitoring System > Monitoring
admin.object System > Objects
admin.organization Manage > Organizations
```

**Note:** Agents can access existing organizations from the search bar, even without this permission. They can even edit an organization's name, domain, and notes!

admin.overview Manage > Overviews

```
admin.package System > Packages
```

admin.report\_profile Manage > Report Profiles

### Hint: Trying to grant access to view reports?

Use report instead.

admin.role Manage > Roles.

admin.scheduler Manage > Scheduler for automation on tickets

admin.security Settings > Security settings of Zammad This also covers third party authentications.

```
admin.session System > Sessions
```

admin.setting\_system Settings > System of Zammad

admin.sla Manage > SLAs

admin.tag Manage > Tags

admin.text\_module Manage > Text Modules

admin.ticket Settings > Tickets (does not grant access to Composer Settings)

admin.time\_accounting Manage > Time Accounting

**Hint:** This permission may be useful for accounting personnel if they need to be able to export timekeeping records.

admin.translation System > Translations (also enables inline translation)

admin.trigger Manage > Triggers

### admin.user Manage > Users

### Note: I thought agents could already manage user accounts?

Agents can create and edit customers, but they can't:

- modify anyone's permissions (roles or groups)
- · modify anyone's passwords
- edit other agents' accounts

Danger: This permission allows users to hijack other user sessions.

To learn more, see Taking over a user's session.

### 3.2.2 Agent Permissions

**Note:** The permissions listed on this page grant access to features that have to be enabled or configured system-wide in the Admin Panel first.

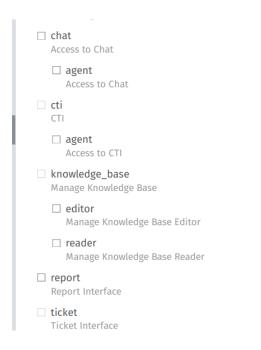


Fig. 5: Agent permissions are shown in the middle of the New Role dialog...



Hint: Requires configuration of *Chat Channel* 

cti.agent Provides access to Caller Log

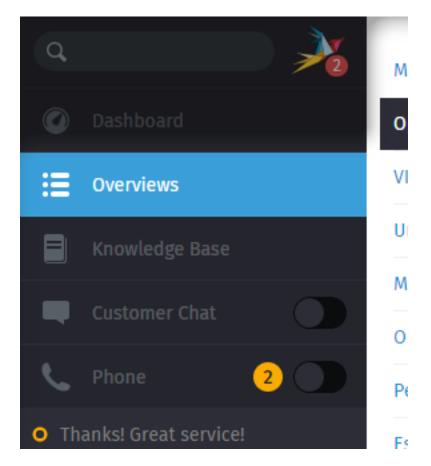


Fig. 6: ... and give users access to new sidebar tabs for communicating with customers.

Hint: Requires configuration of either integrations

- Generic CTI
- placetel
- sipgate

### knowledge\_base Knowledge Base

knowledge\_base.editor create/edit privileges

Hint: Editor permissions always include reader permissions.

knowledge\_base.reader read privileges for internal content

Hint: Public articles are always visible.

### report Reporting

Warning: Never grant this permission to your customers.

Giving customers access to reporting constitutes a serious data breach, as it includes **all ticket** and user information across the entire system!

Note: This permission is the exception to the rule on this page:

- 1. the feature it enables is not for communicating with customers;
- 2. the button appears at the *bottom* of the sidebar; and
- 3. it is typically reserved for admins and supervisors.

ticket.agent (Agent) Overviews

### Note: What's this big table doing here in the middle of my permissions?

Okay, so remember when we said that "roles are just collections of permissions"? That wasn't *entirely* true—they can also be collections of **group access levels**.

To learn more, see Group Access Levels.

### Hint: Point of technicality

As of Zammad 3.5, you can assign both agent and customer roles to the same user—but but you **can't** assign both ticket.agent and ticket.customer *permissions* to the same *role*!

To make it work, you need two separate roles: one with ticket.agent and the other with ticket.customer.

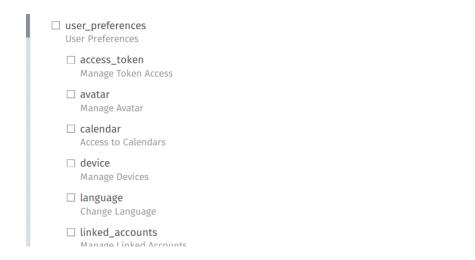
<b>agent</b> Access to Agent T	ickets ba	sed on Gro	up Access		
GROUP	READ	CREATE	CHANGE	OVERVIEW	FULL
HR					
Management					
Marketing					
Sales					

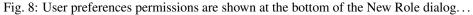
Fig. 7: The group access table is shown when there is more than one active group in the system.

## 3.2.3 User Preferences Permissions

Note: Permissions are namespaced, which is sort of like having files inside of folders.

The permissions listed on this page all belong to the user\_preferences namespace. You can select them individually, or you can just select user\_preferences to enable the whole bunch.





user\_preferences.access\_token Generate API tokens to control Zammad via the REST API

Note: Security Tip

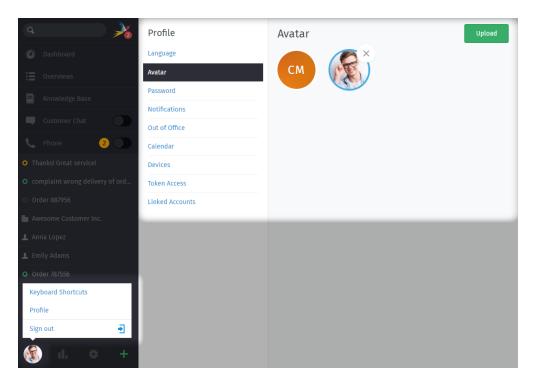


Fig. 9: ... and give users access to the pages of their User Profile.

Generated tokens will never have more permissions than the user that generated them.

user\_preferences.avatar Override the default Gravatar with a custom avatar

user\_preferences.calendar Configure the calendar feed

```
user_preferences.device Manage device login sessions
```

#### Note: Security Tip

Revoking this permission disables "Login detected from a new location" notification emails.

To learn more, see System Notifications.

user\_preferences.language Configure the UI locale/language

**user\_preferences.linked\_accounts** Manually link accounts after signing in with *third-party authentication* 

**Note:** If *automatic account linking* fails, this is the only way your users can utilize third-party logins.

user\_preferences.notifications Configure ticket notification settings

Note: Agents only receive ticket notifications for groups they have "full" access to.

Customers can't receive ticket notifications at all.

user\_preferences.out\_of\_office Designate a substitute for out-of-office hours

### Note: Security Tip

Designating a substitute does **not** grant that person the permissions */ group access levels* of the agent they're replacing.

user\_preferences.password Change account password

### Warning: Third-party authentication / LDAP users:

Be sure to **revoke this permission** for all your users. When using a third-party identity server (like LDAP), the whole point is to let *it* take care of authentication so that passwords never have to live in Zammad's database.

Broadly speaking, there are four types of permissions:

Admin for access to each page of the Admin Panel

Agent for access to customer communications

Customer Without the ticket.customer permission, customers can't see the My Ticket overview—but they can still log in and open new tickets!

User Preferences for access to your own user profile

Note: Permissions are namespaced, which is sort of like having files inside of folders.

These permissions:

- admin.api
- admin.branding
- admin.calendar
- admin.channel\_chat
- admin.channel\_email
- ... and 30+ more

all belong to the admin namespace. You can select them individually, or you can just select admin to enable the whole bunch.

## 3.3 Role Details

**Default at signup** Every new user must be assigned at least one role upon creation. This attribute decides which role to give new users by default (which usually happens when creating a new ticket for a new customer).

Warning: Default roles should never provide admin/agent permissions.

Roles Management		New Role
NAME	DEFAULT AT SIGNUP	ACTION
Admin	no	
Agent	no	Ē
Customer	yes	Ē

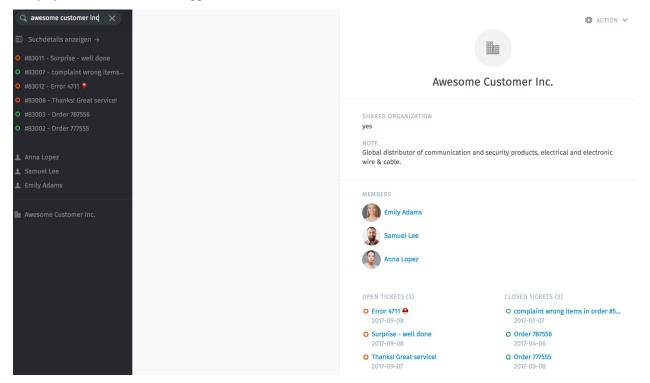
Fig. 10: The default role is identified in the overview of the **Manage > Roles** admin panel.

# Organizations

Organizations allow you to group customers. This has two important advantages, among other things.

1.) As an agent you not only have the overview of a customer's tickets, but also an overview of the entire organization.

For example, by searching for the organization, all the tickets for the organization are displayed and they can be opened easily by a click. This overview appears as follows:



2.) As a customer, you can view and edit your colleagues' tickets (if the organization is a "shared organization", you can set this as a parameter for each organization. See the Edit-Mask).

For example: For a customer user who has only created one ticket himself, but whose entire organization has created 6, the overview would look like this:

My Tickets	1	My Or	ganization Tickets				
My Organization Tickets	6		#	TITLE	CUSTOMER	STATE	CREATED AT $\sim$
		0	83012	Error 4711 👄	Samuel Lee (Awesome Custome	new	2017-09-08
		0	83011	Surprise - well done	Anna Lopez (Awesome Custome	new	2017-09-08
		0	83008	Thanks! Great service!	Emily Adams (Awesome Custom	open	2017-09-07
		0	83007	complaint wrong items in order	Anna Lopez (Awesome Custome	closed	2017-07-07
		0	83003	Order 787556	Samuel Lee (Awesome Custome	closed	2017-04-06
		0	83002	Order 777555	Anna Lopez (Awesome Custome	closed	2017-03-08

In the organizations management area (Admin Interface -> Manage -> Organizations) you can manually add, edit or delete existing organizations. That's the Edit-Mask:

Manage	Organizations M	anadomont			Description
Users	NAME	Edit: Org	anization	×	
Groups	Awesome Customer Inc.	NAME *	SHARED ORGANIZATION *		
Roles	Chrispresso Inc.	Awesome Customer Inc.	yes	~	
Organizations	Good Customer Inc.	DOMAIN BASED ASSIGNMENT *	DOMAIN		
Overviews	Zammad Foundation	yes ~			
Text modules		NOTE			
Macros		Global distributor of communication and secu	rity products, electrical and electronic	wire &	
Tags		cable.			
Calendars					
SLAs		ACTIVE *			
Trigger		active		~	
Scheduler					
Report Profiles		Cancel & Go Back	Su	ubmit	
Time Accounting					

Within the organization the following things can be set:

- if it's a shared organization (All customers who are assigned to this organization can view and edit the group tickets)
- if the assignment is domain based (assign users based on domain)
- note
- if it's active or inactive

## 4.1 Import of organizations via CSV file

With the import action (since Zammad 2.5) you can download a sample CSV file and upload your own CSV file.

To reduce the error rate of unwanted mass changes, a test import is carried out first and a summary appears at the end. If you agree with the summary, the CSV import will be executed.

Manage	Organizati	ODS Monoromot	Description	Import	New Organization
Users	NAME	Import			ACTION
Groups	Monsters, Inc				Ē
Roles	Zammad Foun	Bulk import allows you to create and update many records at once. The data must be in the comma separated values (CSV) format and saved as UTF-8. You can import a CSV file or paste the data directly into			Ē
Organizations	Znuny GmbH	the text area. Alternatively, you can use the Zammad API to import data.			đ
Overviews Text modules		© Create new records Records that exist in the import data (but not in Zammad) will always be created.			
Macros		✓ Update existing records			
Tags		Update existing records with the attributes specified in the import data.			
Calendars		Select CSV file			
SLAs		Datei auswählen Keine ausgewählt			
Trigger		Paste in CSV data			
Scheduler					
Report Profiles		Note: Example CSV file for download.			
Time Accounting					
Channels		Cancel & Go Back Import			

# Overviews

You can provide overviews to your agents and customers. They can be used as a kind of worklist of tasks that the agent is supposed to work off. You can also create individual reports for individual agents or agent groups.

In the Overview Management Area you can add new overviews, edit or delete them.

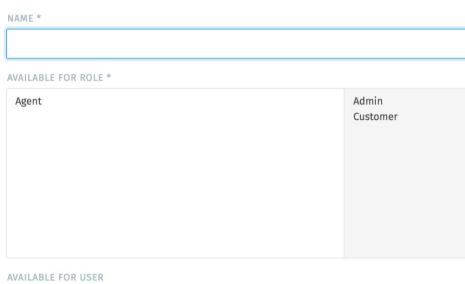
**Warning:** Please note that Overviews can cause performance issues leading to no longer or less often refreshing overviews!

Whenever possible, try to use the same overviews for as many agents and groups as possible to keep the number of overviews low. For best results, you might want to use between 15-20 overviews maximum. Also, any overview will only show a total of 2100 elements.

Note: Overviews will only show tickets to your users, that the user have rights on (group or role based).

The following attributes can be set when creating an overview:

## **New: Overview**



Nothing selected	Q
	-
	Anna Lopez
	Christopher Miller
	David Bell
	Emily Adams
	Emma Taylor
	Jacob Smith
	Nicole Braun
	Olivia Ross
	Dues Davies

#### Available for role / Available for user

**Hint:** Roles are assigned to users, per default there are agents, admins and customers. Further information about *Roles*.

With these settings you can choose whether to make the overviews available to an entire group of people (by selecting the role) or to specific users. The entries in both fields apply. This means that you can also select individual users in addition to sharing the overview for all role members.

ONLY AVAILABLE FOR USERS WITH SHARED ORGANIZATION

no

### Only available for users with shared organization

**Hint:** Shared organization is a setting in the organisations-management. See *Organizations* for more information.

This is only important if the available role is a customer. When deciding whether yes or no is selected, it must be considered to what extent this makes sense - for example, if a customer sees only his own tickets, many views are usually not necessary...

**Note:** Users also refers to the customer role in this case.

ONLY AVAILABLE FOR USERS WHICH ARE REPLACEMENTS FOR OTHER USE

no

#### Available for users which are replacements for other users

This selection refers to the setting in the user preferences (profile-pic in the left corner  $\rightarrow$  profile  $\rightarrow$ ) "out of office". If this option is checked, this selection is only displayed if someone has been entered as a substitution.

**For example:** Agent A is on vacation and Agent B will take care of his tickets. Then an overview can be set up, which only shows Agent B all new tickets from Agent A for this period of time, without having to search for them separately.

Note:	Replacement users are part of our Out of Office function.

CONDITIONS	FOR SHOWN	TICKETS *
------------	-----------	-----------

State	~	is	~	closed new open pending close	-
Owner	~	is	~	not set (not defined) 🗸	

#### Conditions for shown tickets

What conditions should the listed tickets contain? (it is like a filter) You can add more than one condition. In the preview you have the possibility to double check if your entry of the conditions makes sense by directly displaying tickets that match your filtering.

Unassi	gned & Open			OPTIONS
	TITLE	CUSTOMER	GROUP	CREATED AT ^
	another question	Christopher Miller (Chrispresso Inc.)	Service Desk	just now

#### ATTRIBUTES

Which attributes shall be shown in the overview? (column headers)

With this setting you can select the headlines of your overview. Depending on which information is important in this selection, it can be displayed individually. For this example "Unassigned and open" the overview would look like this:

**ATTRIBUTES \*** # 🗹 Title ☑ Customer  $\Box$  Organization Group Owner □ State Pending till Priority Article# Escalation Last contact □ Last contact (agent) □ Last contact (customer) First response Closing time Created by ☑ Created at Updated by Updated at

These settings can also be adjusted individually by admins at a later time (In the overview, top right: Options).

**Note:** Please note that overview column and sort settings are global settings which affect all users seeing those overviews.

ORDER *	
Created at	$\sim$
DIRECTION *	
down	~
GROUP BY	
-	$\sim$
ACTIVE *	
active	$\sim$

### Ordering, grouping and active

• order: In which order should the tickets be displayed? (Sorted by the attributes)

- direction: The direction of the order
- group by: Should the tickets be displayed again grouped by a specific attribute within the list?
- active: Set them active or inactive

## **Text Modules**

Note: Beside text modules Zammad also allows you to use Ticket-Templates for ticket creation.

Text modules can be edited in the admin interface under Manage -> Text modules. Here you will find text snippets already created in the standard version, which can be extended as needed.

### Zammad

A Manage	Text modules Management	Description	New text module
Dashboard Users	New: TextModule	×	ACTION
Groups	NAME *		1
Roles			Add new
Organizations	KEYWORDS		text module
Overviews			
Phone 2 Text modules	CONTENT *	0	
• Thanks! Great service! Macros			
• complaint wrong delivery of ord Tags			
Order 887956 Calendars			
L Chrispresso Inc. SLAS	GROUPS		
L Emma Taylor Trigger	Nothing selected	2nd Level	
Lea Scheduler		Sales Service Desk	
• complaint wrong items in order Time Accounting			
• Order 777555 Knowledge Base			
Channels			
Web			
Form	ACTIVE *		
Email	active	~	
SMS			
Chat	Cancel & Go Back	Submit	
Telegram		ith sunny greeti	

Here you can add new text modules, delete or edit them.

Creating keywords makes it easier to find the right text module.

(	
	ai - Analyse issue easy
	br - Best regards, easy find
1	::eas
$\geq$	Christopher Miller
1	

If needed, you can restrict text modules to specific groups. With this, you can easily keep text module lists short and dedicate specific texts to where they belong.

You can adjust the group memberships for text modules at any time. This allows you to have the text module available globally (no groups selected) or one or several specific groups.

To select placeholders from a list, just enter :: in the text block. The list can be searched with the arrow keys after inputting keywords or shortcuts. All text modules can be used in articles as well as in the chat.

### Zammad

ps	-	We will analyse the issue and get back to you as soon as possi GROUPS	ame}, ance, please contact regarding further ste 2},	
	-	2nd Level	Sales Service Desk	ame], not hesitate to conta t hesitate to contact ou t hesitate to contact
	-	ACTIVE * active	~	
	-			uld send us more de

Note: You can find more information on how to use text modules on our User Documentation.

Tip: If text modules are to be grouped, this can be done using shortcuts. Example country codes:

Text modules are created for the group Germany as follows:

- Ger\_Textmodule1
- Ger\_Textmodule2
- ...

for Austrian-Snippets:

- Aut\_Textmodule1
- Aut\_Textmodule2

thus only the relevant text modules are displayed for each country.

The example text modules below use Variables to dynamically insert information like the customer's or agent's names.

#### **Examples of snippets are:**

```
Hello Mrs. #{ticket.customer.lastname},
Hello Mr. #{ticket.customer.lastname},
Hello #{ticket.customer.firstname},
My Name is #{user.firstname},
```

Of course you can also use multi line snippets.

# 6.1 Delete or clone text modules

Often similar text modules have to be created or unnecessary ones deleted. For these cases you can click on the 3 points in the text module overview on the right side and select the corresponding action:

Manage	Text modules Management		Description Import New text module	
Users	NAME	KEYWORDS	CONTENT CONTENT ACTIO	NC
Groups	an - announcement news		we are happy to inform you about our news	:
Roles	bg - Best Regards		Best Regards	:
Organizations			#{ticket.owner.firstname} #{ticket.last_contact_agent_	
Overviews	bg - Beste Grüße,	-	Beste Grüße,	
Text modules	bur - Bitte um Rückruf	-	ich konnte Sie telefonisch nicht erreichen, können	:
Macros	bw - Best Wishes		Best wishes from	:

When cloning, text modules with all attributes are duplicated and can be edited later.

# 6.2 Import of text modules via CSV file

With the import action (since Zammad 2.5) you can download a sample CSV file and upload your own CSV file.

To reduce the error rate of unwanted mass changes, a test import is carried out first and a summary appears at the end. If you agree with the summary, the CSV import will be executed.

Manage	Text modu	loc Maassamat	Description Import New text	module
Users	NAME	Import	NT	ACTI
Groups Roles	ass - Anliegen	Bulk import allows you to create and update many records at once. The data must be in the comma separated values (CSV) format and saved as UTF-8. You can import a CSV file or paste the data directly into the text area.	Dank für Ihre Antige. erden Ihr Anlige in sichten und uns schnellstmög	: glic
Organizations Overviews	bg - Beste Grü	Alternatively, you can use the Zammad API to import data.	Grüße,	
Text modules	bur - Bitte um	Ø Create new records	nnte die telefonisch nicht erreichen, können Si	. :
Macros	de-kostenlose	Records that exist in the import data (but not in Zammad) will always be created.	;eehrte ::kunde,	
Tags	ff - Für Fragen	Update existing records with the attributes specified in the import data.	agen stehe ich gerne zur Verfügung!	
Calendars	fwf - Für weite	Select CSV file	eitere Fragen stehe ich gerne zur Verfügung!	
SLAs	fwft - Für weit	Datei auswählen Keine ausgewählt	eitere Fragen stehe ich gerne auch telefonisch z	. :
Trigger	glg - Ganz lieb	Paste in CSV data	iebe Grüße,	
Scheduler	hallo - Hallo #		#{ticket.customer.firstname},	
Report Profiles	hf - Hallo Frau	Note: Example CSV file for download.	Frau #{ticket.customer.lastname},	
Time Accounting	hh			
Channels	hh - Hallo Her	Cancel & Go Back	Herr #{ticket.customer.lastname},	
Chumeto	hn - ich wollte		ıllte höflich nachfragen.	

## Macros

Macros are one-click shortcuts for applying changes to a ticket.

If you find yourself making the same changes to lots of tickets (*e.g.*, close-and-tag-as-spam or reassign-to-anothergroup), you can store those changes in a macro for easy access:

۹ 💦 کې	Ticket# 7	Thanks! Great service!	<u>/</u> ~	Ticket ~	÷
🙆 Dashboard		-Emily		GROUP *	
E Overviews		🔒 set to internal 🔥 split		Sales	~
Knowledge Base		3 days 21 hours ago		OWNER	
Customer Chat		TO emily@example.com >>		-	~
C Phone 2				STATE *	
O Thanks! Great service!				open	~
<ul> <li>complaint wrong delivery of ord</li> </ul>	•		<b>P</b>	PRIORITY *	
Order 887956	R	SUBJECT		2 normal	~
Awesome Customer Inc.				TAGS	
📕 🔔 Anna Lopez		LOCRIPT SIGN	(9)	feedback	
Emily Adams		Hello Emily,		+ Add Tag	
• Order 787556		Hello Emily, Thank you for the feedback.		LINKS	
		Christopher Miller			
		christopher mitter		RELATED ANSWERS	
		Super Support - Waterford Business Park		Elat white	×
		5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA Email: hot@example.com - Web: http://www.example.com/		+ Li Close & Tag as Spar	m
		select attachment		Move to RMA	
			v	Reply & Close & Tag	g as Banana
í il. 🔅 🕂			Discard your unsaved changes.	Stay on tab  Upd	late ^

Fig. 1: Choose from the macros Close & Tag as Spam, Move to RMA, and Reply & Close & Tag as Banana.

You can also apply macros in bulk (*i.e.*, to many tickets all at once) via the Overviews page:

You can create or edit macros on the Macros page of the admin panel:

## 7.1 Learn by example

To get you up and running quickly, here are some examples of the kinds of one-click actions you can set up using macros.

Q Dashboard	e .	AS SPAM Heads up 1!	MOVE TO RMA CLOSE AS BA	& TAG	
Customer Chat	× ·	Need more mormation:			09/10/2020
C Phone 2					10/11/2020
					11/11/2020
• Thanks! Great service!					12/11/2020
• complaint wrong delivery of ord					12/11/2020
Order 887956					3 days 21 hours ago
Awesome Customer Inc.					3 days 6 hours ago
1 Anna Lopez					3 days 6 hours ago
1 Emily Adams		DRAG	HERE TO CANCEL		
• Order 787556					3 days 6 hours ago
		O. Error 4711 O			3 days 3 hours ago
					3 days ago
					3 days ago
🛞 il. 🔅 🕂	GRO -	UP OWNER	Y STATE	PRIORITY	✓ Confirm

Fig. 2: Select your desired tickets, then click-and-drag to apply a macro to all of them.

Overviews	Macros Management		Description	New Macro
Text modules	NAME	NOTE	GROUPS	ACT
Macros	Close & Tag as Spam	example macro		:
Tags	Move to RMA	example macro		1
Calendars	Reply & Close & Tag as Banana	example macro		1
SLAs				

**Hint:** If they don't make sense to you, don't worry—just skip ahead to *How do they work?* to learn about all the options in detail, then come back here to see them in action.

1. If you deal with a lot of spam, you could set up a macro that applies the following changes to a ticket:

State closed Tags add spam Owner current user

Tip: Run this macro in a *Scheduler* to periodically clean up unwanted tickets.

2. If you want to set a ticket's state to *pending reminder*, it's usually a two-step process—first select the state, then select a date. To always set a reminder for the same, fixed amount of time (say, seven days later), you can bundle the whole change into a macro:

Note "Postponing ticket for 7 days." (internal visibility only)

State pending reminder

Pending Till relative / 7 / days

Owner current user

## 7.2 How do they work?

Macros are made up of **actions** (changes to a ticket). You can add as many actions to a macro as you want. There are also a few other settings that affect who can use a macro or how it behaves.

## 7.2.1 Creating Macros

۹ 🏄	Manage	Macros Harrant	Description New Macro
Ø Dashboard	Users	New: Macro ×	ACT
:= Overviews		NAME *	
Knowledge Base	Roles	Sample	
Customer Chat		ACTIONS	
C Phone 2	Overviews	State v open v - +	
• Thanks! Great service!	Text modules	Ticket Title	
<ul> <li>complaint wrong delivery of ord</li> </ul>	Macros	Customer Group Owner	
Order 887956		State Pending till	
🖿 Awesome Customer Inc.	SLAs	Priority Tags Article	
上 Anna Lopez	Trigger	Note	
💄 Emily Adams	Scheduler	GROUPS Nothing selected 2nd Level	
O Order 787556	Report Profiles	Sales Service Desk	
	Time Accounting		
	Knowledge Base		
	Channels		
	Web		
		ACTIVE *	
🋞 il. 🌣 🕂	Email	active 🗸	

Actions You can create actions to:

- set ticket attributes (priority, state, group, etc.)
- add new notes to a ticket

There are **no** actions for:

• sending a reply to the customer

**Note:** Unlike triggers, the scheduler, and text modules, macro actions do **not** support the use of *Variables*.

**Warning:** If the ticket is missing a required attribute and the macro doesn't set it, then **no** actions will be applied.

- **Once completed...** After running this macro, should Zammad remain on the current tab, close it, or automatically switch to the next ticket? (Does not apply when running macros "in bulk".)
- Note What should other Zammad admins know about this macro? (Visible only via the "Edit: Macro" dialog, Rails console, and API.)

Groups Which Groups are allowed to see/use this macro?

Active Choose "inactive" to disable this macro without deleting it.

## 7.2.2 Managing Macros

You can delete or even clone existing macros in the Admin Panel under Manage > Macros.

Fig. 3: When cloning a macro, you *must* click "Submit" for the duplicate to be created.

# Tags

With tags, tickets can be categorized and marked.

## 8.1 How to tag

All agents can tag tickets. You can find further information about tagging of tickets on our User Documentation.

# 8.2 Tag-Overviews

You can list all the marked tickets by tag in different ways:

### 1. by providing an appropriate overview

Create a new overview and select "Tag contains ... " as condition. You can find further information in Overviews

### 2. by a search-query

Enter e. g.: tags:banana in the search mask and you will receive all tickets that have been tagged accordingly. For a collected listing, click on "Show Search Details" under the search box:

		CLOSE & TAG AS SPAM		thanks! Great service!
kets			Ryan Parker (Good Customer In 🔛 😈 🔍	110EL 101300
				Sales
		Heads up 🛓		Sales
				Sales
		Error 4711 😬		Sales
			DRAG HERE TO CANCEL Ryan Parker (Good Customer Inc.)	Sales
· · · · ·				Sales
				Service Desk

## 3. by clicking on the tag in the Tag Management Area

In the Tag Management you can find an overview of existing tags used in the system (and a counter how often they are used):

Manage	Tags							
Users	New Tags							
Groups		▲ Allow users to add new tags.						
Roles								
Organizations								
Overviews	Manage Tags							
Text modules		Add						
Macros	NAME	COUNT	ACTION					
Tags	americano	2	Î					
Calendars	banana	1	1					
SLAs	banana	1	Î					
Trigger	banana	0						
Scheduler	complaint	2	Î					
Report Profiles	feedback	1	Î					
Time Accounting	kopi susu	1	1					
	order	4	1					
Channels	positive	1						
Web	viennese melange	1						
Form	wrong delivery	2						

For more information about the individual tags, just click on the blue counter:

<ul> <li>Crtagorder</li> <li>Show Search Details →</li> <li>#83003 - Order 787556</li> <li>#83005 - Order 887956</li> <li>#83004 - Order 787956</li> <li>#83002 - Order 777555</li> </ul>	Manage Users Groups Roles Organizations ews Text moo	Tags New Tags △ Allow users to add new tags. Manage Tags	d	
	Macros	NAME	COUNT	ACTION
	Tags	americano	2	Ť
	Calendars	banana	1	Ť
	SLAs	banana	1	Ť
	Trigger	bai, ma	<ul> <li>Click 1</li> </ul>	Î
	Scheduler	complaint	2	Ŧ
	Report Profiles	feedback	1	Ť
	Time Accounting	kopi susu	1	Ť
		order	4	Ŧ
	Channels	positive	1	Ť
	Web	viennese melange	1	Ť
	Form	wrong delivery	2	Ť
	Email			

Select one of the tickets that appears below the search box or get a complete overview of all tickets by clicking on "Show Search Details":

Q tag:order X	Q, tag:order					×
$\blacksquare$ Show Search Details $\rightarrow$	•	Organization 0		User O	Ticket 4	
<ul> <li>#83003 - Order 787556</li> </ul>	u .	TITLE	CUSTOMER	GROUP	OWNER	CREATED AT
• #83005 - Order 887956	O 83003	Order 787556	Samuel Lee (Awesome Customer	Sales	-	2017-04-06
	O 83005	Order 887956	David Bell	Sales	Christopher Miller (Chrispresso In	2017-06-07
• #83004 - Order 787956	O 83004	Order 787956	Ryan Parker (Good Customer Inc.)	Sales	Christopher Miller (Chrispresso In	2017-05-07
• #83002 - Order 777555	O 83002	Order 777555	Anna Lopez (Awesome Customer I	Sales		2017-03-08

# 8.3 Tag Management Area

Here it can also (in addition to the overview - as described above) be set whether the agents are allowed to add tags themselves or not (in the left upper corner).

You can add more tags or delete them.

# Calendars

A calendar is required to:

- automate ticket escalations,
- generate reports that only capture activity during business hours, or
- set up time-sensitive triggers.

Define a "standard"-calendar which system-wide is valid. Only in the specified business hours, escalation notifications are sent to agents.

If you have customers for which you have to comply with different customer business hours, you can create several calendars. The allocation to the customer tickets can be adjusted via the SLAs.

And this is what it looks like:

Calendar Manageme	nt			Description New Calenda
• Calender New Z	ealand			
TIME ZONE Pacific/Auckland				
BUSINESS HOURS		HOL	LIDAYS	
Monday	10:00-16:00	2017	7-09-15	Sports-Day
Tuesday	10:00-16:00	2017	7-10-23	Labour Day
Wednesday	10:00-16:00	2017	7-11-05	Guy Fawkes Night
Thursday	10:00-16:00			
Friday	10:00-14:00			
Saturday	-			
Sunday	-			
				<b>2. 3. 4. 2. 2. 2. 3. 4. 2. 4. 4. 4. 4. 4. 4. 4. 4</b>
• United States/C	California			Def
TIME ZONE America/Los_Angeles				
BUSINESS HOURS		HOL	LIDAYS	
Monday	09:00-17:00	2017	7-10-09	Columbus Day (regional holiday)
Tuesday	09:00-17:00	2017	7-10-31	Halloween

All created calendars are displayed in the overview.

- 1. Here you can create a new calendar if agents or customers belong to another time zone.
- 2. Just push the delete-button to delete this specific calender all SLAs assigned to this calendar are automatically assigned to the default calendar.
- 3. Pressing this button sets this calendar as the default calendar for the entire system.
- 4. Via this button you get to the edit-mask (same mask as in 1.):

### Zammad

			Ed	lit: Calenc	lar		×	Description	New Calenda
	NAME *								
	Calender	New Zealand							
	TIME ZONE	*							
	Pacific/A	uckland (GMT+12)					~		
	BUSINESS	HOURS							
	Mond	AY 🗹 TUESDAY	☑ WEDNE	☑ THURS	FRIDAY	□ SATURD	SUNDAY		
	FROM	FROM	FROM	FROM	FROM				
	10:00	10:00	10:00	10:00	10:00	10:00	10:00		
	TILL	TILL	TILL	TILL	TILL				
	16:00	16:00	16:00	16:00	14:00	14:00	14:00		
	+	+	+	+	+				
	● Subscrib	CALENDAR FEED to public holiday te to iCalendar feed				ogle will get fetched	l once a day)	Delete Set as De	fault Edit
/		DATE	DESCRIP	TION		ACTION			
	V	2016-10-24	Labour	Day					
		2016-11-05	Guy Fa	wkes Night				onal holiday)	

 $\rightarrow$  determine a name, a time-zone, the business hours to be used for this calendar and special holidays. In addition, you can subscribe to the iCalendar, which will automatically load all holidays from Google (updated once a day) ... and you can add a note.

## SLAs

Service levels and the respective agreements (service level agreements, SLAs) document quality pledges for IT services. SLAs are recorded and administered in here.

A calendar is required to calculate escalations or evaluations based on business hours. Define a "standard" calendar which is valid throughout the system. Only in the specified business hours, escalation notifications are sent to agents. If you have customers for which you need to comply with different business hours, you can create multiple calendars. The customer tickets are allocated via the SLAs.

That's how it works:

NME*   open and new Sales-tickets    TCKET SELECTOR *     State   is   pending close   pending reminder   Group   is   2nd Level   Sales   Service Desk     it   TTLE   CUSTOMER   ROUP   CREATED AT   83010   Heads up \$!   Olivia Ross   Sales   6 days 15 hours   83009   Need more inform   David Bell   Sales   6 days 15 hours   83009   Need some water   Ryan Parker (Good   Sales   6 days 12 hours				Nev	v: SLA		$\times$		
open and new Sales-tickets    TICKET SELECTOR *   State   is   pending reminder   pending reminder   Group   is   2nd Level   Sales   Service Desk      Preview 10 matches   #   TITLE   CUSTOMER   GROUP   CREATED AT   0   83014   Test   Olivia Ross   Sales   6 days 15 hours   0   83008   Thanks! Great serv   Emily Adams (Awe   Sales   6 days 12 hours a   0   83013   Need some water   Ryan Parker (Good   Sales   6 days 12 hours a   0   83012   Error 4711				nici	V. JEA				
TICKET SELECTOR*     State     is   pending reminder   pen	NAME	*					]		
State     is     pending close   pending reminder     Group   is   2nd Level   Sales   Sales   Service Desk     #   TITLE   CUSTOMER   GROUP   CREATED AT     0   83014   Test   Olivia Ross   Sales   6   6   0   83009   Need more inform   David Bell   Sales   6   83008   Thanks! Great serv   Emily Adams (Awe   Sales   6   83013   Need some water   Ryan Parker (Good   Sales   6   days 1 hours a   0   83012   Error 4711   Sales	oper	n and new	Sales-tickets						
State is   pending close pending reminder   Group   is   2nd Level Sales   Service Desk   Preview 10 matches   #   TITLE   CUSTOMER   GROUP   CREATED AT   0   83010   Heads up 🎍!   Olivia Ross   Sales   6 days 15 hours   0   83009   Need more inform   David Bell   Sales   6 days 15 hours   0   83008   Thanks! Great serv   Emily Adams (Awe   Sales   6 days 9 hours a   0   83012   Error 4711   Samuel Lee (Awes   Sales   6 days 12 hours	TICKET	SELECTO	R *				?	Dele	te
State IS   pending close   pending reminder     Group   IS   IS   2nd Level   Sales   Sales   Service Desk      Preview 10 matches   #   TITLE   CUSTOMER   GROUP   CREATED AT    O 83014   Test   Olivia Ross   Sales   6 days 15 hours   0 83009   Need more inform   David Bell   Sales   6 days 15 hours   0 83003   Thanksi Great serv   Emily Adams (Awe   Sales   6 days 9 hours a   0 83012   Error 4711   Samuel Lee (Awes   Sales   6 days 12 hours					new				
Group is   2nd Level   Sales   Service Desk      Preview 10 matches   #   TITLE   CUSTOMER   GROUP   CREATED AT   0 83014   Test   Olivia Ross   Sales   3 days 1 hour ago   8 83010   Heads up <b>e</b> !   Olivia Ross   Sales   6 days 15 hours   8 83009   Need more inform   David Bell   Sales   6 days 15 hours   8 83008   Thanks! Great serv   Emily Adams (Awe   Sales   6 days 9 hours a   8 83013   Need some water   Ryan Parker (Good   Sales   6 days 12 hours	Sta	te	~	is 🗸	pending c		- +		
Group       is       Sales Service Desk       - +         Preview 10 matches         #       TITLE       CUSTOMER       GROUP       CREATED AT         0       83014       Test       Olivia Ross       Sales       3 days 1 hour ago         0       83010       Heads up 🛀!       Olivia Ross       Sales       6 days 15 hours         0       83009       Need more inform       David Bell       Sales       6 days 15 hours         0       83008       Thanks! Great serv       Emily Adams (Awe       Sales       6 days 9 hours a         0       83013       Need some water       Ryan Parker (Good       Sales       6 days 12 hours         0       83012       Error 4711       Samuel Lee (Awes       Sales       6 days 12 hours					pending r	eminder			
Group       is       is       Service Desk         Preview 10 matches         #       TITLE       CUSTOMER       GROUP       CREATED AT         0       83014       Test       Olivia Ross       Sales       3 days 1 hour ago         0       83010       Heads up ♣!       Olivia Ross       Sales       6 days 15 hours         0       83009       Need more inform       David Bell       Sales       6 days 15 hours         0       83008       Thanks! Great serv       Emily Adams (Awe       Sales       6 days 9 hours a         0       83013       Need some water       Ryan Parker (Good       Sales       6 days 12 hours         0       83012       Error 4711 ♠       Samuel Lee (Awes       Sales       6 days 12 hours									
#TITLECUSTOMERGROUPCREATED AT083014TestOlivia RossSales3 days 1 hour ago083010Heads up 斗!Olivia RossSales6 days 15 hours083009Need more informDavid BellSales6 days 15 hours083008Thanks! Great servEmily Adams (AweSales2017-09-07083013Need some waterRyan Parker (GoodSales6 days 9 hours a083012Error 4711 📤Samuel Lee (AwesSales6 days 12 hours	Gro	oup	~	is 🗸		esk	- +		
#TITLECUSTOMERGROUPCREATED AT083014TestOlivia RossSales3 days 1 hour ago083010Heads up 斗Olivia RossSales6 days 15 hours083009Need more informDavid BellSales6 days 15 hours083008Thanks! Great servEmily Adams (AweSales2017-09-07083013Need some waterRyan Parker (GoodSales6 days 9 hours a083012Error 4711 📤Samuel Lee (AwesSales6 days 12 hours									
○       83014       Test       Olivia Ross       Sales       3 days 1 hour ago         ○       83010       Heads up ≗!       Olivia Ross       Sales       6 days 15 hours         ○       83009       Need more inform       David Bell       Sales       6 days 15 hours         ○       83008       Thanks! Great serv       Emily Adams (Awe       Sales       2017-09-07         ○       83013       Need some water       Ryan Parker (Good       Sales       6 days 9 hours a         ○       83012       Error 4711 ♠       Samuel Lee (Awes       Sales       6 days 12 hours	Previe	<b>2W 10</b> match	nes						
O       83010       Heads up ♣!       Olivia Ross       Sales       6 days 15 hours         O       83009       Need more inform       David Bell       Sales       6 days 15 hours         O       83008       Thanks! Great serv       Emily Adams (Awe       Sales       2017-09-07         O       83013       Need some water       Ryan Parker (Good       Sales       6 days 9 hours a         O       83012       Error 4711 ♣       Samuel Lee (Awes       Sales       6 days 12 hours	1	#	TITLE	CUSTOMER		GROUP	CREATED AT		
O       83009       Need more inform       David Bell       Sales       6 days 15 hours         O       83008       Thanks! Great serv       Emily Adams (Awe       Sales       2017-09-07         O       83013       Need some water       Ryan Parker (Good       Sales       6 days 15 hours a         O       83012       Error 4711 €       Samuel Lee (Awes       Sales       6 days 12 hours	0	83014	Test	Olivia Ros	iS	Sales	3 days 1 hour ago		
O       83008       Thanks! Great serv       Emily Adams (Awe       Sales       2017-09-07         O       83013       Need some water       Ryan Parker (Good       Sales       6 days 9 hours a         O       83012       Error 4711 €       Samuel Lee (Awes       Sales       6 days 12 hours	0	83010	Heads up 🏜!	Olivia Ros	S	Sales	6 days 15 hours		
O       83013       Need some water       Ryan Parker (Good       Sales       6 days 9 hours a         O       83012       Error 4711 €       Samuel Lee (Awes       Sales       6 days 12 hours	0	83009	Need more inform	David Bel	ι	Sales	6 days 15 hours		
O 83012 Error 4711   Samuel Lee (Awes Sales 6 days 12 hours	0	83008	Thanks! Great serv	Emily Ada	ms (Awe	Sales	2017-09-07		
	0	83013	Need some water	Ryan Park	ær (Good	Sales	6 days 9 hours a		
	0	83012	Error 4711 👄	Samuel Le	ee (Awes	Sales	6 days 12 hours		
CALENDAR *	CALEN	DAR *							
Calender New Zealand - Pacific/Auckland	Cale	nder New	Zealand - Pacific/Auckla	and			~		
LA TIMES		TYPE			TIME in hours				
ACTIVE TYPE TIME in hours				se.	02:00				
ACTIVE TYPE TIME in hours					hh:mm				
ACTIVE     TYPE     TIME in hours       Image: Second sec	V			blem.	16:00				
ACTIVE     TYPE     TIME in hours       Image: Market Action of the first response.     02:00       Image: Update Time Timeframe for every following response.     hh:mm       Image: Market Action Time     Image: Market Action Time									

- 1. Give it a distinctive name
- 2. Specify the ticket groups for which the SLA is to apply (these can also be arbitrarily combined and thus specified)
- 3. In the preview you see the selection of the tickets and doublecheck wheather those are correct
- 4. Choose the business-calender
- 5. Define the SLA-Times:

First Response Timeframe for the first response (external call, email)

Update Time Timeframe for every following response (external call, Email)

Solution Time Timeframe for solving the problem (status: closed)

It is up to you if you set one, two or all three times. When the SLA time is reached, the ticket escalates. Now all agents get notifications, which have stored the corresponding setting in their own settings profile -> notifications. The information that a ticket is escalated can be selected in the triggers as an attribute, whereby a desired action can be followed.

# Triggers

Use triggers to set up all kinds of if-this-then-that automation workflows.

Hint: For every-so-often automation workflows, try schedulers instead.

The first thing to know about triggers is that **you're already using them**. From the moment you set up Zammad, it starts sending auto-replies to all incoming emails. Recognize this line?

It means that the ticket is from an incoming customer email, and that the customer received this message in response:

This auto-reply message is a **trigger**. You can disable it, modify it, or create new ones for all sorts of automation tasks on the Trigger page of the admin panel:

# 11.1 Learn by example

To get you up and running quickly, here are some examples of the kinds of automation tasks you can set up with triggers.

**Hint:** If they don't make sense to you, don't worry—just skip ahead to *How do they work?* to learn about all the options in detail, then come back here to see them in action.

- 1. Any time Jacob Smith creates a ticket, assign it to the Sales group:
- 2. Emma Taylor is responsible for all sales internally, so if a new ticket has the word "order" in the subject, assign it to her and make sure it's set with a high priority:
- 3. Send an auto-reply email to *anyone* who responds to a ticket:

#### Note: Not all automated messages come from triggers!

	¢			✓ 2/2 < >
V		paghetti policy?		
Asking for a friend.				
See more				
🔒 set to internal	ireply 45 min	➡ forward nutes ago	\Lambda split	
				ę
"Thanks for yo	ur inquiry (What is your spa	ghetti policy?)" -> "charlie.kelly@	ogmail.com"	а. •
Enter Note or <b>select attac</b> l	iment			

	Thanks for your inquiry (What is your spaghetti policy?) [Ticket#84002] Index ×	ē	Ø
1	Zammad Helpdesk 5:19 PM (50 minutes ago)	•	:
	Your request (Ticket#84002) has been received and will be reviewed by our support staff.		
	To provide additional information, please reply to this email or click on the following link (for initial login, please request a new password): https://example.zammad.com/#ticket/zoom/2		
	Your Zammad Helpdesk Team		
	Zammad, your customer support system		
	← Reply → Forward		

Manage	Triggers Management	Description	New Trigger
Users	NAME		ACTI
Groups	auto-reply-(on-follow-up-of-tickets)		:
Roles	auto reply (on new tickets)		:
Organizations	customer notification (on owner change)		:
Overviews			
Text modules			
Macros			
Tags			
Calendars			
SLAs			
Trigger			

Manage	Triggers Hansemant	Description	New Trigger
Users	New: Trigger		ACTI
Groups	NAME *		
Roles	Specific user to specific group		
Organizations	CONDITIONS FOR EFFECTED OBJECTS *		
Overviews	Customer v is v specific user v Jacob Smith <jacob@chris +<="" td="" –=""><td></td><td></td></jacob@chris>		
Text modules			
Macros	EXECUTE CHANGES ON OBJECTS		
Tags	Group V Sales V - +		
Calendars	ACTIVE *		
SLAs	active 🗸		
Trigger			
Scheduler	Cancel & Go Back Submit		
Report Profiles			

Manage	Triggere Hansement		Description	New Trigger
Users	New: Trigger	×		ACTI
Groups	NAME *			
Roles	priotize order tickets			
Organizations	CONDITIONS FOR EFFECTED OBJECTS *			
Overviews		- +		
Text modules		- +		
Aacros	EXECUTE CHANGES ON OBJECTS			
ags	Group V Sales V	- +		
alendars	Owner → specific user → Emma Taylor <emma@chi< td=""><td>- +</td><td></td><td></td></emma@chi<>	- +		
LAs				
rigger	Priority V 3 high V	- +		
cheduler	ACTIVE *			
eport Profiles	active	~		
ime Accounting				
Knowledge Base	Cancel & Go Back	ubmit		
Channels				

Manage	Triggers Manag	(om ont				Description	New Trigger
Users		Ne	w: Trigger		×		ACTI
Groups	NAME *						
Roles	auto-reply on ticket	updates					
Organizations	CONDITIONS FOR EFFE	CTED OBJECTS *					
Overviews	Action	v is v	updated 🗸		- +		
Text modules							
Macros	EXECUTE CHANGES ON	OBJECTS					
Tags		public		~			
Calendars		Article Last Sender		Owner Customer			
SLAs				All Agents			
Trigger				~			
Scheduler							
Report Profiles	Email 🗸				- +		
Time Accounting		Auto Danka					
Knowledge Base		Auto-Reply					
Channels		We have received your possible!	<u>eply and</u> will <u>get</u> back	<u>to you as soon as</u>			
Web							

×

For instance, when *agents* receive a system email about a newly created ticket, that's built into the system itself. If you need to customize those, you will have to *manually edit files on your server*.

## 11.2 How do they work?

Triggers consist of two parts: **conditions** and **changes**. Conditions answer the question, "when should this trigger fire?" Changes answer the question, "what should happen when it does?"

Triggers are evaluated in alphabetical order, by **name**. In some situations triggers might be the wrong choice, see *Limitations* for more information.

#### Hint: Email trigger behavior can be manipulated

Please have a look at *Email header manipulation* in case this is a relevant use case for you.

## 11.2.1 Conditions

When creating a trigger, define your conditions here:



N	AME *				
C	ONDITIONS FOR EFFE	CTED OBJECTS *	k.		
	State	~	is v	closed merged new open	- +
	Owner	∽ is	✓ specific user	∽ ✓ Samuel Lee <samuel@exa< td=""><td>- +</td></samuel@exa<>	- +
	Calendar 🗸	is not in 🗸	United States/Ca	alifornia - America/Los_Angeles 🗸 🗸	-+

EXECUTE CHANGES ON OBJECTS

Trigger conditions are **and-selectors** and thus all conditions must apply as configured for the trigger to fire. You can configure triggers to fire based on the properties of:

• **The Ticket itself** *e.g.*, Was this ticket newly created? Is the ticket currently open? When was the last time we received contact from the customer on this ticket?

- New Articles on the ticket *e.g.*, Was this article added by email? by phone? Was it created by an agent, or a customer? Does the subject contain a certain set of words?
- The Customer that created the ticket *e.g.*, What is the customer's name? Is the customer a VIP? What department does the customer work in?
- The Organizations that the ticket's customer belongs to *e.g.*, What is the name of the customer's organization? Does it have a note attached to it containing a certain set of words?
- The Execution time the trigger is being triggered *e.g.*, Only send an auto-reply if the message was received outside of regular business hours. ("Regular business hours" can be defined on *Calendars* setting.)

## 11.2.2 Actions

When creating a trigger, define your changes here:

EXECUTE CHANGE	SON	DBJECTS			
State	~	merged	~		-+
Owner	~	specific user 🗸	Emma Taylor <emma@ch< td=""><td>1</td><td>-+</td></emma@ch<>	1	-+
		public		~	
		Nothing selected		Article Last Sender Owner Customer All Agents	
Email	~				- +
		Subject			

A trigger can do the following things once its conditions have been met:

• Modify the ticket *e.g.*, Escalate its priority, close it, reassign it, rename it, add tags, etc.

Date & time attributes (like **Pending till** or **Escalation at**) can be specified in *absolute* or *relative* terms.

- Send an email or SMS Either to the customer, the agent who owns the ticket, or every agent in the system.
- Fire a webhook Connect Zammad to another web service or application to give it live updates about new tickets.
- Add internal or public notes to the ticket This allows you to help your agents with specific information if needed. (e.g. automated changes a trigger applied to the ticket)

**Note:** In order to send emails with Triggers, you need to configure an email address for the group the trigger is working in. If you don't, Zammad will skip the Trigger completely.

**Hint:** Certain actions (such as *Email*, *SMS* and *Notes*) support *Variables*, which can be used to build highly-customized message templates.

## **11.3 Limitations**

It's important to understand when a trigger can be used and when it's better to use e.g. Zammads *Scheduler* or postmaster filter.

Triggers will fire during the following conditions:

- · Creation of a ticket
- Updating a ticket

While the creation of tickets and triggering these actions is straight forward, updated of tickets are a bit trickier. In terms of triggers, a ticket is only updated if you press the update button on the lower right of a ticket. Adding tags to a ticket or switching articles visibility **is no ticket update**.

Also keep in mind that we're always only working on the last article. This means you can't trigger for past articles. Triggers always handle the current ticket attributes and the article (if applicable) that cause the trigger to fire.

If your use case doesn't fit in above possibilities, you might want to have a look at Zammads Scheduler.

## **11.4 System Notifications**

Note: System notifications can only be customized on self-hosted installations.

System notifications are automated emails sent by Zammad for critical system events, such as account changes or SLA violations.

Unlike the automated emails you can set up using *Triggers* or the *Scheduler*, these notifications are built into Zammad itself: if you need to customize them, you will have to modify some of the files on your server.

### 11.4.1 When are they sent?

All users are notified of:

· password change requests

Staff (admins & agents) are notified of:

- logins from a new device
- logins from a new country

Agents are notified of:

- new tickets
- ticket updates
- "ticket pending" reminders
- SLA violations (before and after the deadline)

Daily reminder emails are sent at midnight (UTC) for all unresolved "ticket pending" reminders and SLA violations.

## 11.4.2 How can I customize them?

Inside your Zammad directory (usually /opt/zammad), email templates for various events are stored inside the /app/views/mailer directory, named according to the language they're written in. Thus,

/opt/zammad/app/views/mailer/ticket\_create/de.html.erb

is the German-language template used to notify agents whenever a new ticket is created. To modify this template, create another file with the same name and add a .custom suffix:

/opt/zammad/app/views/mailer/ticket\_create/de.html.erb.custom

Now, this file will be used instead of the original when sending notification emails in German.

## Webhook

Webhooks are a way to integrate Zammad with other web services or applications, allowing them to subscribe to live updates about tickets instead of having to poll the Zammad server every *n* minutes.

#### Note: Webhooks may not arrive immediately.

Webhooks are sent out with the same priority and order as email triggers. If webhook dispatch fails (*e.g.*, because the receiving server is misconfigured), Zammad will retry up to four times.

Hint: Webhooks are available for *Triggers* and *Scheduler*.

## 12.1 How does it work?

Under the hood, Zammad sends a POST request to a third-party URL ("API endpoint") you specify in the New Trigger dialog. The application server behind this URL/endpoint must be configured to receive messages from Zammad and handle the attached data accordingly.

Webhook requests from Zammad contain the following JSON data about new/incoming tickets:

- ticket attributes/metadata
- all associated articles
- associated users (e.g., article senders, owners, etc.)
- associated user roles
- associated user organizations (if applicable)
- · associated groups

### 12.1.1 Adding webhooks

Webhooks are defined globally. This allows you to use one specific endpoint on several triggers or schedulers.

#### Warning: Zammad webhooks are specific

Keep in mind that the remote site has to be able to understand the webhook Zammad is sending! Simply throwing Zammad payloads at webhook endpoint may not have the desired result!

gs	Webbooks Management Description Example Pauload New	v Webhook
lendars	Edit: Webhook	ACT
As	NAME *	. 1
	Sample	
ohook	ENDPOINT *	
eduler	https://	
o <mark>rt Pro</mark> l	HMAC SHA1 SIGNATURE TOKEN	
e Accou	s3cr3t!	
vledge	SSL VERIFY	
annel	yes 🗸 🗸	
	NOTE	
1		
	ACTIVE *	
gle	Cancel & Go Back Submit	
rosoft 3		
ter		

You can configure the following information to webhooks:

Name (mandatory) This name will be displayed within trigger and scheduler selections.

Endpoint (mandatory) Webhook endpoint Zammad sends its payload to.

Note: Zammad ignores basic authentication parameters.

**HMAC SHA1 Signature Token** If set all sent webhooks contain a *x-hub-signature* header allowing the remote site to verify the request.

#### Note: Security note

This *does not* encrypt the payload. Use HTTPs connections to secure the communication. It contains a HMAC signature of the body of the webhook request

Learn more about HUB-Signatures

SSL verify Defaults to yes - if you're using unsecure self signed certificates set this option to no.

- **Note** If required you can leave useful information for other Zammad admins to understand the webhook in question better.
- Active If set to inactive you can no longer select the webbook within trigger or scheduler actions.

**Warning:** Setting webhooks to inactive that are used by triggers or schedulers will not run. If triggers or schedulers have other actions configured as well they'll still be executed.

### 12.1.2 Webhook Payload

#### Tip: A more personal payload...

Your Zammad instance also provides a payload as example. This payload *does fit your installation* and provides your custom objects!

Macros	Webbooks Hanzamant	Example Payload	New Webhook
Tags	Evenuela Devide ed	_	
Calendars	Example Payload	create and configure your V	
SLAs	Header	. create and configure your r	
Trigger	X-Zammad-Trigger: Name of the Trigger X-Zammad-Delivery: 66600811-06a3-40af-ae0d-a2d8213e85aa X-Hub-Sinanture: sina106000f23384435f40091cdfa3c770b3d85d7be		
Webhook			
Scheduler	Body		
Report Profiles	{     "ticket": {     "article count": 1,		
Time Accounting	"article_ids": [ 24		
Knowledge Base	], "close_at": null,		
Channels	"close_diff_in_min": null, "close_escalation_et": null, "close_in_min": null, "create_article_sender": "Customer",		

### **Request headers**

Zammad sends the following headers in each webhook POST request:

User-Agent "Zammad User Agent"

- X-Zammad-Trigger The name of the originating trigger
- X-Zammad-Delivery A unique, random ID string
- X-Hub-Signature The SHA-1 hash of your HMAC-SHA1 signature token (assuming you provided one when creating your trigger)

#### **JSON** payload (example)

```
{
  "ticket": {
    "article_count": 1,
    "article_ids": [
        104
    ],
    "create_article_sender": "Customer",
```

```
(continued from previous page)
```

```
"create_article_sender_id": 2,
"create_article_type": "phone",
"create_article_type_id": 5,
"created_at": "2020-11-13T14:34:35.282Z",
"created_by": {
  "active": true,
  "created_at": "2020-11-13T12:57:47.679Z",
  "created_by": "-",
  "created_by_id": 1,
  "email": "chris@chrispresso.com",
  "firstname": "Christopher",
  "id": 3,
  "image": "7a6a0d1d94ad2037153cf3a6c1b49a53",
  "lastname": "Miller",
  "login": "chris@chrispresso.com",
  "organization": "Chrispresso Inc.",
  "organization_id": 2,
  "out_of_office": false,
  "role_ids": [
   1,
   2
  ],
  "roles": [
   "Admin",
    "Agent"
  ],
  "updated_at": "2020-11-13T13:00:03.064Z",
  "updated_by": "chris@chrispresso.com",
  "updated_by_id": 3,
  "verified": false,
  "vip": false,
},
"created_by_id": 3,
"customer": {
  "active": true,
  "address": "Bennelong Point\nSydney NSW 2000",
  "created_at": "2020-11-13T12:57:48.779Z",
  "created_by": "-",
  "created_by_id": 1,
  "email": "emily@example.com",
  "firstname": "Emily",
  "id": 8,
  "image": "99ba64a89f7783c099c304c9b00ff9e8",
  "lastname": "Adams",
  "login": "emily@example.com",
  "note": "did order café au lait, ask next time if the flavor was as expected",
  "organization": "Awesome Customer Inc.",
  "organization_id": 3,
  "out_of_office": false,
  "phone": "0061 2 1234 7777",
  "role_ids": [
   3
  ],
  "roles": [
    "Customer"
  ],
  "updated_at": "2020-11-13T14:34:37.366Z",
```

```
"updated_by": "chris@chrispresso.com",
     "updated_by_id": 3,
     "verified": false,
     "vip": false,
   },
   "customer_id": 8,
   "group": {
     "active": true,
     "created_at": "2020-11-13T12:57:47.498Z",
     "created_by": "-",
     "created_by_id": 1,
     "follow_up_assignment": true,
     "follow_up_possible": "yes",
     "id": 3,
     "name": "Service Desk",
     "updated_at": "2020-11-13T12:57:48.044Z",
     "updated_by": "-",
     "updated_by_id": 1,
     "user_ids": [
       З,
       4,
       5
     ],
     "users": [
       "chris@chrispresso.com",
       "jacob@chrispresso.com",
       "emma@chrispresso.com"
     ]
   },
   "group_id": 3,
   "id": 81,
   "last_contact_at": "2020-11-13T14:34:35.318Z",
   "last_contact_customer_at": "2020-11-13T14:34:35.318Z",
   "number": "10081",
   "organization": {
     "active": true,
     "created_at": "2020-11-13T12:57:47.524Z",
     "created_by": "-",
     "created_by_id": 1,
     "domain_assignment": false,
     "id": 3,
     "member_ids": [
       8,
       6,
       7
     ],
     "members": [
       "emily@example.com",
       "anna@example.com",
       "samuel@example.com"
     ],
     "name": "Awesome Customer Inc.",
     "note": "Global distributor of communication and security products, electrical...
→and electronic wire & cable.",
     "shared": true,
     "updated_at": "2020-11-13T14:34:35.346Z",
     "updated_by": "-",
```

```
"updated_by_id": 1
},
"organization_id": 3,
"owner": {
  "active": true,
  "created_at": "2020-11-13T12:57:48.036Z",
  "created_by": "-",
  "created_by_id": 1,
  "email": "emma@chrispresso.com",
  "firstname": "Emma",
  "id": 5,
  "image": "b64fef91c29105b4a08a2a69be08eda3",
  "lastname": "Taylor",
  "login": "emma@chrispresso.com",
  "organization": "Chrispresso Inc.",
  "organization_id": 2,
  "out_of_office": false,
  "role_ids": [
   2
  ],
  "roles": [
    "Agent"
  ],
  "updated_at": "2020-11-13T12:57:48.072Z",
  "updated_by": "-",
  "updated_by_id": 1,
  "verified": false,
  "vip": false,
},
"owner_id": 5,
"priority": {
  "active": true,
  "created_at": "2020-11-13T12:54:02.238Z",
  "created_by": "-",
  "created_by_id": 1,
  "default_create": true,
  "id": 2,
  "name": "2 normal",
  "updated_at": "2020-11-13T12:54:02.238Z",
  "updated_by": "-",
  "updated_by_id": 1
},
"priority_id": 2,
"state": "open",
"state_id": 2,
"ticket_time_accounting": [],
"ticket_time_accounting_ids": [],
"title": "Webhook-Test",
"updated_at": "2020-11-13T14:34:35.333Z",
"updated_by": {
  "active": true,
  "created_at": "2020-11-13T12:57:47.679Z",
  "created_by": "-",
  "created_by_id": 1,
  "email": "chris@chrispresso.com",
  "firstname": "Christopher",
  "id": 3,
```

```
"image": "7a6a0d1d94ad2037153cf3a6c1b49a53",
     "lastname": "Miller",
     "login": "chris@chrispresso.com",
     "organization": "Chrispresso Inc.",
     "organization_id": 2,
     "out_of_office": false,
     "role_ids": [
       1,
       2
     ],
     "roles": [
       "Admin",
       "Agent"
     1.
     "updated at": "2020-11-13T13:00:03.064Z",
     "updated_by": "chris@chrispresso.com",
     "updated_by_id": 3,
     "verified": false,
     "vip": false,
   },
   "updated by id": 3
 },
 "article": {
   "attachments": [
       "id": 174,
       "filename": "image1.jpeg",
       "size": "35574",
       "preferences": {
         "Content-Type": "image/jpeg",
         "Mime-Type": "image/jpeg",
         "Content-ID": "81.969520479@zammad.example.com",
         "Content-Disposition": "inline",
         "resizable": true,
         "content preview": true
       },
       "url": "https://zammad.example.com/api/v1/ticket_attachment/81/104/174"
     }
   ],
   "body": "This is a simple Webhook Test.<div><br></div><div>\n<imq style=\"max-
→174?view=inline\"><br>\n</div>",
   "content_type": "text/html",
   "created_at": "2020-11-13T14:34:35.318Z",
   "created by": {
     "active": true,
     "created_at": "2020-11-13T12:57:47.679Z",
     "created by": "-",
     "created_by_id": 1,
     "email": "chris@chrispresso.com",
     "firstname": "Christopher",
     "id": 3,
     "image": "7a6a0d1d94ad2037153cf3a6c1b49a53",
     "lastname": "Miller",
     "login": "chris@chrispresso.com",
     "organization": "Chrispresso Inc.",
     "organization_id": 2,
```

```
"out_of_office": false,
  "role ids": [
   1,
    2
  ],
  "roles": [
   "Admin",
    "Agent"
  ],
  "updated_at": "2020-11-13T13:00:03.064Z",
  "updated_by": "chris@chrispresso.com",
  "updated_by_id": 3,
  "verified": false,
  "vip": false,
},
"created_by_id": 3,
"from": "Emily Adams <emily@example.com>",
"id": 104,
"internal": false,
"origin_by": "emily@example.com",
"origin_by_id": 8,
"sender": "Customer",
"sender_id": 2,
"ticket_id": 81,
"to": "Service Desk",
"type": "phone",
"type_id": 5,
"updated_at": "2020-11-13T14:34:35.318Z",
"updated_by": {
  "active": true,
  "created_at": "2020-11-13T12:57:47.679Z",
  "created_by": "-",
  "created_by_id": 1,
  "email": "chris@chrispresso.com",
  "firstname": "Christopher",
  "id": 3,
  "image": "7a6a0d1d94ad2037153cf3a6c1b49a53",
  "karma_user_ids": [],
  "lastname": "Miller",
  "login": "chris@chrispresso.com",
  "organization": "Chrispresso Inc.",
  "organization_id": 2,
  "out_of_office": false,
  "role_ids": [
   1,
    2
  ],
  "roles": [
    "Admin",
    "Agent"
  ],
  "updated_at": "2020-11-13T13:00:03.064Z",
  "updated_by": "chris@chrispresso.com",
  "updated_by_id": 3,
  "verified": false,
  "vip": false,
},
```

```
"updated_by_id": 3,
"accounted_time": 0
}
```

Note:

}

- For better readability, all empty and null values have been omitted from the sample payload above. That means the webhooks you receive *will include additional fields not shown here*.
- Webhooks will also include fields for any relevant custom objects defined in your system.
- Attachments are not included; links to attachments are (authentication required).
- None of the following user attributes are included:
  - last\_login
  - login\_failed
  - password
  - preferences
  - group\_ids
  - groups
  - authorization\_ids
  - authorizations

### 12.1.3 Webhook Logs

Zammad provides a history of your recent webhooks. You can find them below Recent logs.

۹ 🏄	Macros	Webhoo	<b>Dks</b> Management	De	scription Example	Payload New Web	ohook
	Tags Calendars	NAME		ENDPOINT			ACTI
	SLAs	WebhookIn	box_Sample				:
	Trigger	WebhookSit	te_Sample			46.0078-005	:
Customer Chat	Webhook	Recent lo	gs				
Sector Phone 2	Scheduler Report Profiles	DIRECTION	REQUEST		CREATED AT		
	Time Accounting	out	200 POST		8 minutes ago		
	Knowledge Base	out	200 POST		8 minutes ago		
	Channels						
	Web						
	Form						
	Email						
	SMS						
	Chat						
	Google						
🔊 il. 🔅 🕂	Microsoft 365						
	Twitter						

If you need more details you can click on the request link in question. Zammad will provide a modal with the following information:

Direction Always out.

**URL** The URL Zammad sent the request to.

Method Always POST.

Status Contains the HTTP status code the remote server replied with. Should be 2xx if successful.

Request Contains the request Zammad sent (HTTP header and payload)

**Response** Contains the remotes response header.

Created at Date and time the request was sent.

## Scheduler

The scheduler performs time-based automated actions. You can set up your own schedulers, configure at which points in time they should run, set up conditions to determine which tickets they should affect, and then configure the actions that you want to be executed on these tickets.

**Note:** Schedulers with *Action: Delete* are currently the only way in the Zammad front end to permanently delete tickets. This limitation is intentional as Zammad is designed to be revision-proof. A possible use case for such a scheduler is to delete spam tickets some time after creation (e.g. 30 days).

**Warning:** While it is possible to delegate scheduler permissions to normal agents with the admin/scheduler permission, it is inadvisable to do so. Malicious agents could use a scheduler to access tickets in restricted groups (by moving them to a non-restricted group) or to delete arbitrary tickets.

**Hint:** Schedulers can be used to send periodic reminder emails. Use *Variables* to build highly-customized email templates.

# 13.1 Add a new scheduler

Manage	Sch		E	dit: Sch	eduler			×
Users	NA	NAME *						
Groups	Sales	Sales::set the owner to	supervisor after a	ticket escala	ted 30 mini	utes ago		
Roles	2	WHEN SHOULD THE JOB	RUN?					)
Organizations	_	Run every Monday, Tue	ocday Wodpocday 1	Thursday and	Friday at 0	0.00		
Overviews		Kun every Monday, Tue	suay, weunesuay,	inursuay anu	riiuay at u	9.00		
Text modules		DAY		HOUR				MINUTE
Macros		Monda		00	01	02	03	00
Tags		Tuesda	у	04	05	06	07	10
		Wednesc	lay	08	09	10	11	20
Calendars		Thursda	ау	12	13	14	15	30
SLAs		Friday		16	17	18	19	40
Trigger		Saturda	ау	20	21	22	23	50
Scheduler		Sunda	y					
Report Profiles	- 3.	CONDITIONS FOR EFFEC	TED OBJECTS					
Time Accounting					losed			
		State	∽ is	× c	new open			- +
Channels				F	ending clo	se		
Web					nd Level			
Form		Group	∨ is		<b>ales</b> Service Des	k		- +
POTITI								
Email		Escalation	✓ bef	ore (relative)	~	30 🗸	Minute(s	5) ~ - +
Chat				()	•	50 V		

Prev	<b>/iew 8</b> matches				
_	#	TITLE	CUSTOMER	GROUP	CREATED
0	83001	Welcome to Zamm	Nicole Braun (Zam	Sales	5 days 2 hours
0	83011	Surprise - well do	Anna Lopez (Awes	Sales	5 days 11 hour
0	83012	Error 4711 兽	Samuel Lee (Awes	Sales	5 days 8 hours
0	83013	Need some water	Ryan Parker (Good	Sales	5 days 5 hours
0	83008	Thanks! Great serv	Emily Adams (Awe	Sales	6 days 2 hours
0	83009	Need more inform	David Bell	Sales	5 days 11 hour
EXE	CUTE CHANGE	S ON OBJECTS			
	)wner	∽ specific user →	∽ Emma Taylor <em< td=""><td>ima@</td><td>-</td></em<>	ima@	-
Р	Priority	✓ 3 high ✓			
DISA	ABLE NOTIFICA	TIONS *			
ΝΟΤ	E				
so	omething must	be done about these t	ickets		
ACT	IVE *				
ac	tive				
Cano	<u>cel &amp; Go Back</u>				Submi

- 1. *Name*: choose a name for the scheduler.
- 2. When should the job run: choose the points in time using UTC timezone when the scheduler should run.
- 3. *Conditions for affected objects*: determine the ticket attributes (conditions) to limit on which tickets the actions configured in step 5 are to be performed.

- 4. *Preview*: this list previews some tickets that your conditions are matching and shows a total of how many tickets are being matched. Use this to double-check the entered conditions.
- 5. Execute changes on objects: determine the changes to be made to the ticket.
- 6. *Disable notifications*: by default, actions triggered by schedulers won't send notifications. You can override this here by setting this to *no*.
- 7. *Note*: you can use the note field to describe the purpose of the scheduler. This is only visible to other admins when they are editing the scheduler. It is *not* a way to add notes to tickets.
- 8. Active: with this setting you can enable/disable the scheduler.

The scheduler shown in the screenshot would have the following effects:

Every workday (Monday to Friday) at 9:00 a.m. (UTC), all tickets which:

- · are not closed and
- are assigned to the Sales group and
- whose escalation was 30 minutes ago

#### will be:

- assigned to Emma and
- have their priority changed to 3 high.

As a supervisor in the Sales group, this enables Emma to intercept and process escalated tickets.

Emma will not receive notifications when the scheduler assigns her these tickets, and no note will be added to them.

## **Report-Profiles**

Report profiles are used to restrict / filter report-results. The idea of the profiles is to limit the number of tickets and determine the type of tickets you want to analyze. You can create any number of profiles in the Admin Interface in the "Report Profile" area. The edit-mask looks like this:

۹ 🏄	Manage	anort Drofiles Hannand	New Profile
🖉 Dashboard	Users	Edit: Report Profile	ACTI
Cverviews	Groups	NAME*	
Knowledge Base	Roles	tickets created from awesome customer - last month	
• Thanks! Great service!	Organizations	FILTER	
• complaint wrong delivery of ord	Overviews Text modules	Organizatior v v specific or, v Awesome Customer Inc. – +	
Order 887956	Macros	Created at v within last (rela v 1 v Month(s) v - +	
🏙 Awesome Customer Inc.	Tags	Preview 4 matches	
👤 Anna Lopez	Calendars	# TITLE CUSTOMER GROUP CREATED AT	
上 Emily Adams	SLAs	71008 Thanks! Great ser Emily Adams (Awe Sales 2 days 3 hours	
• Order 787556	Trigger	71011 Surprise - well do Anna Lopez (Awes Sales 1 day 12 hours	
	Scheduler	O 71012 Error 4711 ⊖ Samuel Lee (Awes Sales 1 day 9 hours a	
	Report Profiles	O 71014 PR material! Emily Adams (Awe Sales 1 day 6 hours a	
	Time Accounting	ACTIVE *	
	Knowledge Base	active ~	
	Channels		
	Web	Cancel & Go Back	
	Form		
	Email		
🛞 il. 🌣 🕂	SMS		

This example shows the statistics of all tickets of the organization "Awesome Customer" that were created in the last month.

The filters can be combined with each other as desired. The filters build on each other, which means that they are further restricted per additional attribute.

All configured filters are displayed in the statistics area and you can switch between them with one click:

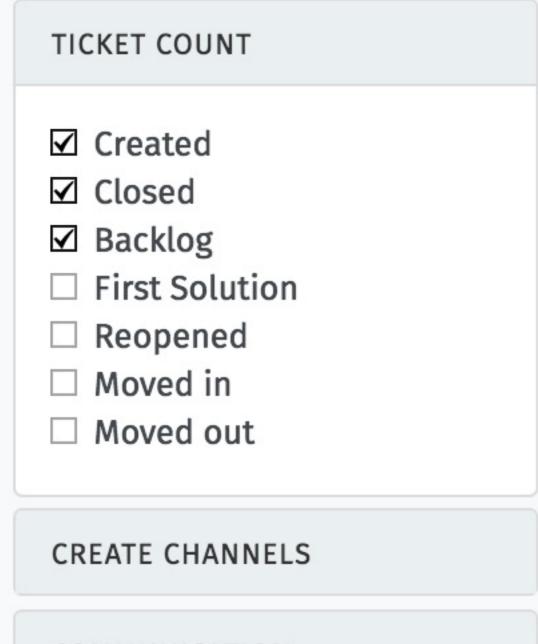
۹ 🏄	Reporting					
	TICKET COUNT	Year	Month	Week	Day	Realtime
	Created Cosed Backlog First Solution Reopened Noved in Noved out CREATE CHANNELS COMMUNICATION Profiles  - all- Citckets created from awesome customer - last month	4.5 4.0 3.5 3.0 2.5 2.0 1.5 1.0 0.5 0.0 0.5 0.0 0.5 0.0 0.5 0.5	d First Solution	May Jun J Reopened Moved In	ul Aug Sep	Oct Nov De
		#	TITLE	STATE	GROUP	CREATED AT
		<b>o</b> 71014	PR material!	open	Sales	1 day 6 hours ago
		<b>o</b> 71012	Error 4711 😁	new	Sales	1 day 9 hours ago
		O 71011	Surprise - well done	new	Sales	1 day 12 hours ago
🛞 il. 🗢 +		O 71008	Thanks! Great service!	open	Sales	2 days 3 hours ago

# 14.1 Further information about the reporting:

The time period and time interval can be changed with one click (the graphic adapts itself directly):



You can filter the Create Channels (Phone, Email, Twitter,...) and Communication (Phone, Email, Twitter,...) and select metrics (choose from the menu bar in the upper left corner - currently Ticket Count, Create Channels, Communication). Here are all tickets with a certain metric of a profile evaluated.



# COMMUNICATION

The list below the graphic shows the tickets that have been filtered out. This can be downloaded as CSV and processed in a statistics program:

### Zammad

2017	2018 <b>2019</b>						
Crea	ated Closed	First Solution	Reopened	Moved in	Moved out		
D0	WNLOAD 4 RECORD(:	5)					
	#	TITLE	STAT	E	GROUF	P CREAT	ED
0	71014	PR material!	ope	n	Sales	a 1 day 6 hour	's ag
0	71012	Error 4711 <del>O</del>	new		Sales	a 1 day 9 hour	's ag
0	71011	Surprise - well done	new		Sales	a 1 day 12 hour	's ag
0	71008	Thanks! Great service!	ope	n	Sales	2 days 3 hour	's ag

# **Time Accounting**

If you want to know how much time you need for your each project, you can enable time accounting (turn on the switch on the top left side of the page).

It can be set for which tickets the time accounting is activated - that means for which tickets you can enter, how much time was needed. It's possible to set multiple conditions (these can also be arbitrarily combined and thus specified):

Time Accounting										
Selector										
Enable time accounting f	or following matchin	g tickets.								
CONDITIONS FOR EFFECT	ED OBJECTS *									
State	~ is		ig close	- +						
Group	✓ is	2nd Lev Sales Service		- +						
Save										

For all set cases (in this example, this is for each "Update" of tickets that are not closed and in the group 'Sales') the following field appears for entering the invested time:

Ticket# 83		Support Request				
		Time Supp:	e Accounting ×		Ticket ~ GROUP *	$\rightarrow$
	Ticket# 830		e which you want to account.		Sales	~
		110				
	Hello I have a question	skip	Account Time		Emma Taylor	~
	Set to internal	reply	\Lambda split		STATE *	
		just now		_	open	~
R	I didn't reached him			<b>P</b>	PRIORITY *	
C.					2 normal	~
-						

In the admin area there are different possibilities to get an overview of the accounted times.

There is a monthly overview for all counted times. By clicking on the desired year and month you can see all corresponding tickets:

Overv	iews											
2015	2016	201	7									
Jan	Feb	Mar	Apr	Mai	Jun	Jul	Aug	Sep	Oct	Nov	Dec	

The tickets can be arranged according to customers and organization. All views can be downloaded as a CSV file (click on the down arrow).

Ticket 🖶										
TICKET#	TITLE	CUSTOME R	ORGANIZA TION	AGENT	TIME UNITS	TIME UNITS TOTAL	CREATED AT	CLOSED AT		
83018	Inquiry	David	-	Christo	10.0	10.0	3 days	3 days		
83017	anothe	Christo	Chrispr	Christo	15.0	15.0	4 days			
Customer										
CUSTOMER			ORGANIZATION			TIME UNITS	TIME UNITS			
david@ex	ample.com					10.0				
chris@chi	rispresso.con	n	Chrispresso Inc.			15.0				
Organization I										
ORGANIZATION			TIME UNITS							
Chrispresso Inc.			15.0							

Knowledge Base

ENGLISH (UNITED STATES) 🗸

Year Community
A How can we help you? Search for an answer or a topic...

Image: Community

Image: Community
</

Publish your own library of FAQs, how-tos, internal SOPs and more with the knowledge base.

Fig. 1: See a live demo at https://support.zammad.com/help.

Hint: This document describes how to configure the knowledge base.

© Zammad Test System

For details on how to use and edit it, please refer to the Zammad Agent docs.

By default, only admin users are permitted to create, edit, and manage knowledge base articles. See *Roles* for details on how to grant write access to agents or other users.

Note: The knowledge base will not appear in the main menu until it has been enabled in the admin panel.

## **16.1 Features**

- Multi-language support
- Visibility settings (draft, staff-only, or public)
- · Full text search
- · Scheduled publishing
- File attachments
- Wiki-style internal linking to both KB answers and tickets
- Rich text editor + embedded images

## 16.2 Setup

To enable the knowledge base, first select the languages/locales you wish to publish in:

۹ 🏄	Manage		Knowledge Race			
🖉 Dashboard	Users		Create Know	ledge Base		
E Overviews	Groups		Languages *			
Knowledge Base	Roles		You can provide different versions of your knowle			
	Organizations	language below, then select it in the Knowledge Base Editor to add your translations.				
Customer Chat	Overviews		LANGUAGE		DEFAULT	DELETE
C Phone 2	Text modules		English (United States)	~	۲	
• Thanks! Great service!	Macros		Select locale	~		
o complaint wrong delivery of ord	Tags					
O Order 887956	Calendars					Submit
📗 Awesome Customer Inc.	SLAs					
👤 Anna Lopez	Trigger					
👤 Emily Adams	Scheduler					
Order 787556	Report Profiles					
	Time Accounting					
	Knowledge Base					
	Channels					
🏽 🛞 il. 🔅 +	Web					

Fig. 2: You must choose at least one. (Don't worry, you can always change them later!)

Read on for details about each section of the knowledge base configuration.

### 16.2.1 Theme

۹ 🏄	Manage	Knov	vledge Ba	se									
🖉 Dashboard	Users	Theme	Languages	Pu	iblic Mer	u	Custom	n URL	De	elete			
Cverviews	Groups	leen 0. Link	Calar										
Knowledge Base	Roles	Icon & Link	Color										
	Organizations	#38ae6a										Sul	omit
Customer Chat	Overviews												
C Phone 2	Text modules	Header Col	or									_	
• Thanks! Great service!	Macros	#f9fafb										Sul	omit
• complaint wrong delivery of ord	Tags												
Order 887956	Calendars	Icon Set * Every category in your knowledge base should be given a unique icon for maximum visual clarity. Each set below provides a wide range of icons to choose from, but beware-you can't mix and match different icons											
Awesome Customer Inc.	SLAs												
👤 Anna Lopez	Trigger	from different sets. Choose carefully!											
👤 Emily Adams	Scheduler	Font Awesome O (*) 🕃 📩 🔝 🔯 🛣				ţ,	1						
Order 787556	Report Profiles				0			0	<	3	ý	0	Q
	Time Accounting	○ ◎ ☎ ■ ⊘ ↔ ⅔ 록				₩							
	Knowledge Base				To				PayPul	ē	Þ	$\odot$	1
	Channels				-	U	Ť						
		Website		<b>5</b> 5	\$	*	66		(0)	۲	8	4	
	Web	Anticon		>_	7	2		0	- Go		[··)		5
🛞 ii. 🗢 🕂	Form	2.10			4	Ľ		$\lor$	0		0	<u> </u>	0
· · · · · · · · · · · · · · · · · · ·				(	()	Q	6	$\sim$	>	-		$\ni$	^

Fig. 3: Customize the appearance of the knowledge base.

**Icon & Link Color** Applies to all **category & article** entries in knowledge base menus, as well as hyperlinks in articles.

Header Color Applies to the area surrounding the search bar.

Icon Set Defines the selection of icons that may be used when creating/editing categories.

Each category in the knowledge base *must* be given an icon. Icons appear prominently in the main menu, like so:

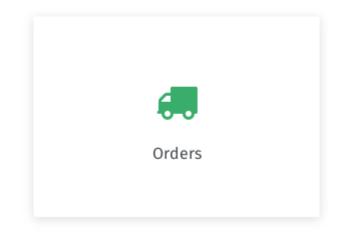
**Warning:** Re-assigning icons on all of your categories is tedious work. It's advisable to explore your options early to avoid having to change your mind down the road.

### 16.2.2 Languages

The knowledge base will automatically display the language matching each visitor's locale. Visitors may always manually switch to another language via a dropdown menu in the footer.

The default locale is displayed when the visitor's locale is not supported.

Articles that have not yet been translated into a given language will be hidden from that locale.



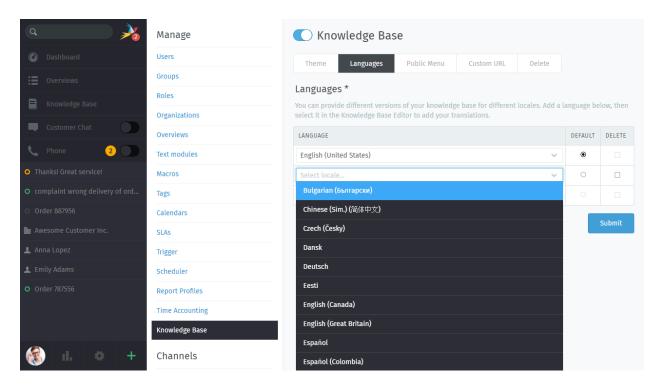


Fig. 4: Add or remove locales, or reassign the default.

### 16.2.3 Public Menu

۹ 🏄	Manage	C	Knowledge Base				
Ø Dashboard	Users	т	neme Languages	Public Menu Custom URL	Delete		
Overviews	Groups	End	ish (United States)				
Knowledge Base	Roles	Eligi		URL	TAR	CFT	DELETE
	Organizations						
Customer Chat	Overviews		Zammad Services	https://zammad.com/pricing		lew tab	
Phone 2	Text modules		Open Source	https://zammad.org/		lew tab	
• Thanks! Great service!	Macros		Community	https://community.zammad.org		lew tab	
• complaint wrong delivery of ord	Tags		+ Add				
O Order 887956	Calendars						Submit
朣 Awesome Customer Inc.	SLAS						

Fig. 5: Customize the nav menu that appears in the header of the knowledge base.

Hint: Target let's you decide if you want the link to be opened within a new browser tab upon click or not.

Use this section to unify the knowledge base with your own website's main navigation. Entries added here will appear in the knowledge base like so:

1	Zammad Services	Open Source	Community
q			
ų			

## 16.2.4 Custom URL

Note: This feature	is only available on <b>sel</b>	lf-hosted instances.
۹.	Manage	Knowledge Base
🖉 Dashboard	Users	Theme Languages Public Menu Custom URL Delete
Overviews	Groups	
	Roles	Custom URL
	Organizations	The default URL for your knowledge base is e.g. example.com or example.com/help. To serve it from a custom URL instead, enter the destination below (e.g., "/support", "example.com", or
Customer Chat	Overviews	"example.com/support"). Then, follow the directions under "Web Server Configuration" to complete the process.
C Phone 2	Text modules	
	Macros	
	rd Tags	Web Server Configuration Submit

Fig. 6: Relocate the knowledge base to the URL of your choosing.

By default, the knowledge base will appear at the same domain as your Zammad instance, under /help.

If you wish to customize where it can be accessed, enter your desired URL here and configure your web server as described (instructions provided for Apache and NGINX only).

## 16.2.5 Delete

۹ 🏄	Manage	C Knowledge Base			
🕜 Dashboard	Users	Theme Languages Public Menu Custom URL Delete			
Overviews	Groups	Permanently Delete Knowledge Base			
Knowledge Base	Roles	Deleting your knowledge base requires an additional verification step. To proceed, enter its name below ("Zammad Helpdesk Knowledge Base"). THIS ACTION CANNOT BE UNDONE.			
Customer Chat	Organizations				
	Overviews				
Phone 2	Text modules	Delete Knowledge Base			
• Thanks! Great service!	Macros				
• complaint wrong delivery of ord	Tags				

Fig. 7: Permanently delete the knowledge base and all the articles within it.

Use this panel to delete the knowledge base. If you wish to unpublish it without deleting all its content, simply disable it via the toggle button at the top of the window instead.

## Web

You can define whether a customer can create tickets via the web interface or not. If they can you can furthermore define groups for which a customer can create tickets via web interface. "-" means all groups are available.

	NAME AND ADDRESS OF ADDRE	
۹ 🏄	SLAs	Web
	Trigger	Enable Ticket creation
	Scheduler	Defines if a customer can create tickets via the web interface.
	Report Profiles	yes v Submit
Phone 2	Time Accounting	
	Channels	Group selection for Ticket creation
	Web	Defines groups for which a customer can create tickets via web interface. "-" means all groups are available.
<ul> <li>complaint wrong delivery of ord</li> <li>Order 887956</li> </ul>	Form	2nd Level Sales
	Email	Service Desk
	SMS	
	Chat	
	Twitter	
	Facebook	
	Telegram	
	Settings	
🚳 il. 🗢 🕂	Branding	
	System	•

That means for example: if you are working with a dispatcher, you could implement a group "Income" and only select this group here. Thus, all incoming tickets are routed to this group and can be dispached to other groups from here.

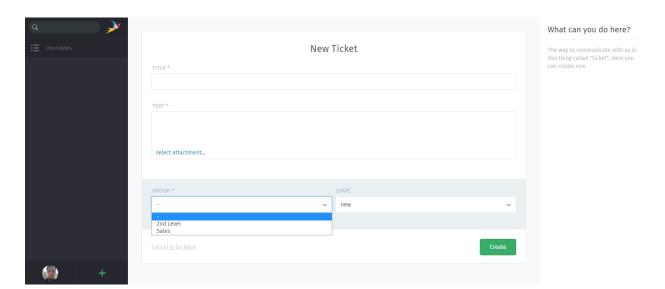


Fig. 1: In this example we selected "Sales" and "2nd Level" to be selectable for the customer.

## Forms

Hint: At the moment it is not possible to add more (or custom) fields to a Zammad Form.

**Note:** The form is currently limited to one form per instance.

Feedback or contact forms are quite often used on websites. Usually they will generate an email which will be sent to somebody who forwards it and so on. With Zammad it's quite easy to integrate these forms into your website and directly generate tickets with them. In just 2 minutes.

Go to "Admin -> Channels -> Form" and enable the switch for this feature. Below you can adapt your form settings.

### Zammad

۹ 🎽	Groups	C Form				
Dashboard	Roles	With form you can add a formular to your web page wi	tch directly generates a Ticket for you			
	Organizations					
Cverviews	Overviews	Designer	NAME OF FORM SUBMIT BUTTON			
Customer Chat	TextModules	Feedback Form	Submit			
• Hi Zammad, thanks for unlockin	Macros	MESSAGE AFTER SENDING FORM				
	Tags	Thank you for your inquiry! We'll contact you soon as				
	Calendars		<i>A</i>			
	SLAs	OPTIONS				
	Trigger	Enable debugging for implementation.				
	Scheduler	□ Show title in form.				
	Report Profiles	☑ Start modal dialog for form.				
	Channels	□ Load no CSS for form. You need to generate your o	wwn CSS for the form.			
	Web	PREVIEW				
	Form					
	Email					
	Chat					
🋞 11. 🔅 +	Twitter					

In preview mode you can test if the form fits your needs (e. g. if it opens as modal dialog or if it's shown inline on the website)

Q   >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Groups Roles Organizations Overviews TextModules	OPTIONS         Enable debugging for implementation.         Show title in form.         Start modal dialog for form.         Load no CSS for form. You need to generate your own CSS for the form.	
• Hi Zammad, thanks for unlockin	Macros Tags	PREVIEW	
	Calendars	Feedback Form	
	SLAs Trigger	NAME Your Name	
	Scheduler Report Profiles	EMAIL Your Email	
	Channels Web	MESSAGE Your Message	
	Form Email	Submit	
il. 0 +	Chat Twitter	You need to add the following Java Script code snipped to your web page:	

Just copy the JavaScript snippet and paste it into your website. That's all. Just 2 minutes.

۹	Groups	Your Name
Dashboard	Roles	EMAIL
	Organizations	Your Email
Overviews	Overviews	MESSAGE
Customer Chat	TextModules	Your Message
• Hi Zammad, thanks for unlockin	Macros	
	Tags	4
	Calendars	Submit
	SLAs	
	Trigger	You need to add the following Java Script code snipped to your web page:
	Scheduler	<button id="feedback-form">Feedback</button>
	Report Profiles	<pre><script id="zammad_form_script" src="http://localhost:3000/assets/form/form.js"></scr</pre></th></tr><tr><th></th><th>Channels</th><th>ipt> <script></th></tr><tr><th></th><th>Web</th><th><pre>\$(fiption() {     \$('#feedback-form').ZammadForm({     } }</pre></th></tr><tr><th></th><th>Form</th><th><pre>messageTitle: 'Feedback Form', messageSubmit: 'Submit',</pre></th></tr><tr><th></th><th>Email</th><th><pre>messageThankYou: 'Thank you for your inquiry! We\'ll contact you soon as possibl e.',</pre></th></tr><tr><th></th><th>Chat</th><th><pre>showTitle: true };</pre></th></tr><tr><th></th><th>Twitter</th><th><pre>}); </script></pre>
🕷 il. 🌣 +		

Finally, the forms will look as follows:

Zammad Home Features Tour Pricing Getting Started	
NAME	
Your Name	
EMAIL	
Your Email	
MESSAGE	
> X X X Your Message	
Marienstraße 11 Größere Karte ansehen	Zammad GmbH Marienstraße 11
Grouere Karte ansenen	10117 Berlin
Sapering La	Germany
	*
Spreebogenpark	P +49 (0) 30 60 98 54 18-9
	F +49 (0) 30 60 98 54 18-8
SOL Friedrichstrasse station 🖗 O	M enjoy@zammad.com
Google Dorotheens -	
C2016 Google - Kartendaten i Nutzungsbedingungen - Fehler bei Google Maps melden	Open contact form

## **18.1 Potential Spam-Issue**

The Form function could be abused by sending a higher amount of messages / tickets to your Zammad instance. If you do not use Zammad-Forms: **disable** them.

But don't worry! Zammad does limit the maximum created tickets based on different criteria. It also ensure that the email address being used is valid (with MX-Check on the email's domain).

	e	
Option	Default value	Description
form_ticket_create_by_ip_per_hour	20	Limits Ticket-creation per IP and hour to 20
		Tickets
form_ticket_create_by_ip_per_day	240	Limits Ticket-creation per IP and day to 240
		Tickets
form_ticket_create_per_day	5000	Limits Ticket-creation for forms to 5000
		Tickets per day

Table 1: Form settings to limit Ticket-Creation

**Hint:** You can change the above default values, please keep in mind, that setting those values higher might lead to problems in term of created Tickets. Please note that the following changes require console access to your hosts that runs Zammad.

#### Change the Ticket-Creation per IP and hour to 10:

rails> Setting.set('form\_ticket\_create\_by\_ip\_per\_hour','10')

Change the Ticket-Creation per IP and hour to 50:

rails> Setting.set('form\_ticket\_create\_by\_ip\_per\_day','50')

Change the Ticket-Creation per day to 500:

```
rails> Setting.set('form_ticket_create_per_day','500')
```

## 18.1.1 Further options to make it harder

Another way to make it harder for bots to automate against your Zammad instance is to change the location of form. js (/opt/zammad/assets/form/form.js).

Please keep in mind if you change the location of form.js (by e.g. copying) that you need to ensure that your form.js stays up to date if you update Zammad.

Further more it's not recommended to delete form.js from it's location, but to forbid the access to it with your webserver configuration (if wanted).

# CHAPTER 19

# Email

# **19.1 Accounts**

## 19.1.1 Account Setup

Setting up a new email account? Here's what all the settings do.

But first, a word of warning! The import process does things you might not expect:

#### Danger: Zammad will delete all emails in your inbox during the import process.

Use the *Experts* dialog to *disable this behavior*.

**Warning:** Zammad will send an auto-reply message to every email it imports. (Including the old ones!) Use the *Experts* dialog to *change this behavior*.

Note:

- **Gmail / G Suite users:** Google is in the process of upgrading its security policies. To stay up-to-date, do **not** add your account as an email channel—instead, create a *Google channel*.
- Microsoft 365 users: Microsoft is in the process of upgrading its security policies. To stay up-to-date, do not add your account as an email channel—instead, create a *Microsoft 365 channel*.

Microsoft 365 / Exchange users: Shared mailboxes are not supported.

#### Basic

In most cases, Zammad is smart enough to figure out your email provider's configuration based on your email address alone.

Organization & Department Name The display name used for outgoing email.

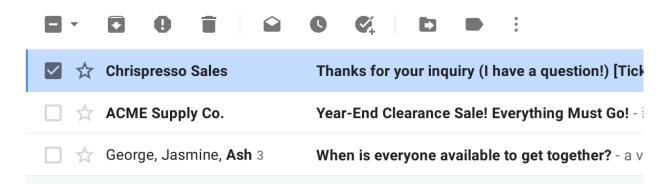


Fig. 1: A customer's inbox with an auto-reply from Chrispresso Sales.

If you add *multiple addresses* to a single account, you can define a separate Organization & Department Name for each one.

Email display names value can be *further customized in the Settings tab*.

Email Your email address.

If your account login/username is different from your email address, use the *Experts* dialog (see below).

If your inbox receives mail for more than one email address, be sure to *add your alternate addresses* after account setup.

Password Your account password.

If your email provider requires you to enter a one-time passcode (sent via SMS) when logging in, you'll have to generate an app password to use with Zammad.

Destination Group The group that incoming mail will be assigned to.

Use *filters* for more fine-grained sorting of incoming email.

#### **Experts**

If Zammad can't figure out how to connect your account (or if you just want to access advanced settings), use the *Experts* dialog.

#### **Email Inbound**

#### Type Choose from IMAP and POP3.

In most cases, you want IMAP. (With POP3, you won't be able to *keep messages on the server* or *specify which folder to fetch from.*)

Host Your email server's hostname or IP address (e.g., imap.gmail.com).

Contact your email provider or system administrator if you don't know.

Password Your account password.

If your email provider requires you to enter a one-time passcode (sent via SMS) when logging in, you'll have to generate an app password to use with Zammad.

SSL / STARTTLS Enable encryption when fetching messages.

Choose from yes and no; Zammad will detect which protocol to use.

Port Your email server's port (usu. 993 for IMAP, or 995 for POP3).

Contact your email provider or system administrator if you don't know.

Folder Specify which folder to fetch from, or leave empty to fetch from INBOX.

If specifying a nested folder, be sure to use the full path. (Some systems use different **path separators**; *e.g.*, Inquiries/Tech-Support vs. Inquiries.Tech-Support. Contact your email provider or system administrator if you don't know.)

#### Note: Additional Steps Required

In the last step of the account setup process, Zammad sends you an email from your own account, then waits for it to appear in the folder specified here. Account verification will not complete until this test message has been received.

If this folder does not receive incoming messages automatically, you may have to manually check your inbox during the verification step and move Zammad's test message there when it arrives.

Keep messages on server Specify what happens to your emails after Zammad imports them:

- no Zammad deletes all imported messages
- yes Zammad marks imported messages as read

(With this option, Zammad will only import unread messages. This means Zammad may miss messages if the mailbox is externally modified.)

#### Note: Why does Zammad delete messages by default?

If you never clean out your inbox, it'll eventually reach its storage limit, and your mail server will start **rejecting incoming messages**. Most Zammad users never even look at their inbox once it's set up, so they rely on Zammad to keep it clean for them.

If you choose **yes** here, remember that it's your responsibility to clean out your inbox from time to time to keep it below its storage limit.

#### Import as

During the import process, Zammad treats **all messages** (including ones you've already read from months or years ago) as if they had been sent today: senders will receive auto-replies saying "your message has been received and we'll get back to you within 24 hours," and tickets created for each message will be marked as "new".

Use this option to disable this behavior for messages more than two weeks old.

Note: This option may not be shown if:

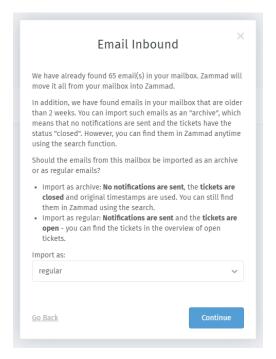


Fig. 2: How should old emails be imported?

- · all messages in your inbox are less than two weeks old
- you selected Keep messages on server: Yes
- you selected Type: POP3

For more fine-grained control, manually disable this and other *triggers* before adding an email account, then turn them back on once all your messages have been imported.

#### **Email Outbound**

Send mails via Choose from SMTP and local MTA (e.g., Sendmail).

Local MTA (mail transfer agent) configuration is only available on self-hosted installations.

- Host Your email server's hostname or IP address (e.g., smtp.gmail.com).
- User Your account login/username.

Leave blank to use the same value from incoming account setup.

Password Your account password.

Leave blank to use the same value from incoming account setup.

Port Your email server's port (usu. 587 or 465).

Zammad will detect and enable SSL/STARTTLS support automatically.

#### Verification

As a final step, Zammad sends a test email from your own account, to your own account. Once this test email is received, the new account setup process is complete!

#### Troubleshooting

• Is a custom incoming mail folder to blame?

## 19.1.2 Secondary Addresses

Secondary addresses (also known as *aliases*) allow you to send emails with a different "From:" address from the one on the account.

Fig. 3: Once you add a secondary address, you can configure a group to start sending emails with it.

Warning:	Do not abuse this feature.			

If you use secondary addresses to impersonate other parties, your IP is liable to get added to a spam blacklist.

Your email provider may also be set up to *receive incoming messages* for many addresses in the same mailbox. If this is the case, be sure to add your alternate inbox addresses here.

Display Name The display name used for outgoing email.

	<b>G C</b> , <b>D D</b> :
🗹 🛧 Chrispresso Sales	Thanks for your inquiry (I have a question!) [Tick
ACME Supply Co.	Year-End Clearance Sale! Everything Must Go! -
🔲 ☆ George, Jasmine, Ash 3	When is everyone available to get together? - a v

Fig. 4: A customer's inbox with an auto-reply from Chrispresso Sales.

Email display names value can be *further customized in the Settings tab*.

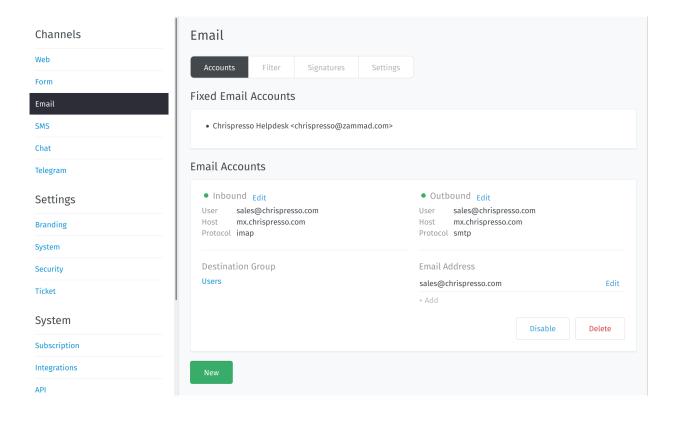
Email The alias address to send outgoing messages as.

Channel The email account to be used when sending outgoing messages from this alias.

Note Optional. Only visible from this dialog, the REST API, and the Rails console.

## **19.1.3 Managing Accounts**

Once an account has been added, use the Accounts panel to edit its configuration.



<ul> <li>Inbound Edit</li> </ul>	<ul> <li>Outbound Edit</li> </ul>			
Jser sales@chrispresso.com	User sales@chrispresso.com			
Host mx.example.com Protocol imap	Host mx.example.com Protocol smtp			
Destination Group	Email Address			
Sales	sales@chrispresso.com E			
	+ Add			

Mail Server Settings Click Edit on inbound/outbound account details to change your server configuration.

See New Account Settings for a detailed description of each option.

Note: In some browsers, you may have to manually re-enter your password.

Destination Group Click on the group name to reassign the account.

<ul> <li>Inbound Edit</li> </ul>	<ul> <li>Outbound Edit</li> </ul>	
User sales@chrispresso.com	User sales@chrispresso.com	
Host mx.example.com	Host mx.example.com	
Protocol imap	Protocol smtp	
Destination Group	Email Address	
Sales	sales@chrispresso.com	Edit
	+ Add	
	Disable	Delete

Only active groups will be displayed.

Changing this setting will not reassign existing tickets to the new group.

Hint: Still can't send outgoing email tickets? Check your group settings.

Email Address Use the + Add or Edit buttons to set up secondary addresses on this account.

See Secondary Addresses for a detailed description of each option.

<ul> <li>Inbound Edit</li> </ul>	<ul> <li>Outbound Edit</li> </ul>	
User sales@chrispresso.com	User sales@chrispresso.com	
Host mx.example.com	Host mx.example.com	
Protocol imap	Protocol smtp	
Destination Group	Email Address	
Sales	sales@chrispresso.com	Edit
	+ Add	

Enabled / Disabled Disabling an account temporarily prevents Zammad from importing its messages.

This may be necessary during scheduled maintenance or when migrating your installation to a new host.

Note: Disabling an account disables *outgoing* messages for it, as well.

Delete Deleting an account removes its configuration from Zammad entirely.

#### Note: Additional Steps Required

When an email account is deleted, its *email aliases* remain in the system. Be sure to reassign or delete them manually.

iowledge Base	Email		
hannels	Accounts Filter Signatures Settings		
	Email Accounts		
il	Notice: Unassigned email addresses, assign them to a channel or delete them.           Chrispresso Support <support@chrispresso.com>         ×</support@chrispresso.com>		
	Chrispresso helps <help@chrispresso.com></help@chrispresso.com>		
ter	Inbound Edit     Outbound Edit		
	User sales@chrispresso.com User sales@chrispresso.com		

Fig. 5: Click on the address to assign it to another account, or click to delete it.

Groups need an assigned an address to send outgoing emails. If you delete a group's assigned address, agents belonging to that group won't be able to send emails until you assign it a new one.

### **19.1.4 Email Notification**

Note: The notification channel can only be configured on self-hosted installations.

For more information, see System Notifications.

System notifications are automated emails sent by Zammad for critical system events, such as account changes or SLA violations.

Use the Email Notification panel to configure how Zammad dispatches these notifications.

Send mails via Choose from SMTP and local MTA (e.g., Sendmail).

Host Your email server's hostname or IP address (e.g., smtp.gmail.com).

User Your account login/username.

**Hint:** The "From:" address on system notifications can be configured under *Channels* > *Email* > *Settings* > *Notification Sender*.

Password Your account password.

Port Your email server's port (usu. 587 or 465).

Zammad will detect and enable SSL/STARTTLS support automatically.

#### Note: This looks familiar... Where have I seen it before?

This configuration step was part of the Getting Started wizard:

🗼 Zammad	
Email Notification	
SEND MAILS VIA *	
Local MTA (Sendmail/Postfix/Exim/) - use servev	
Go Back Continue	

Account Setup Use the New Email Account dialog to connect your account.

Secondary Addresses Send and receive email at additional email addresses, all through the same mailbox/account.

Managing Accounts Edit the configuration of existing accounts in the Accounts Panel.

*Email Notification* Configure the outgoing mail provider for system notifications. (Self-hosted installations only.)

# **19.2 Filters**

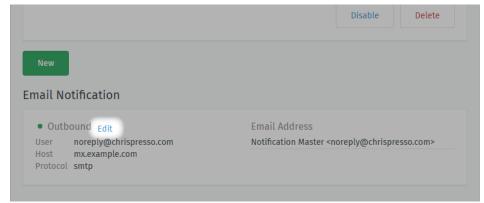
Postmaster filters allow you to match email headers (e.g. From, To, Subject, X-Spam-Flag etc.) and execute a set of actions whenever Zammad's email parser encounters a matching email. The actions will be applied to the ticket that is created or updated by this email. Here are some examples of what is possible with filters:

· Automatically dispatch tickets into certain groups:

For example, tickets from amazon.com could automatically be dispatched to the Purchasing group.

From: contains: regex: (\. |@) amazon\.com

hannels	Email				
eb	Accounts Filter Signatures Settings				
orm					
nail	Fixed Email Accounts				
S	Chrispresso Helpdesk <chrispresso@zammad.com></chrispresso@zammad.com>				
at					
egram	Email Accounts				
ettings	<ul> <li>Inbound Edit</li> <li>User sales@chrispresso.com</li> </ul>	<ul> <li>Outbound Edit</li> <li>User sales@chrispresso.com</li> </ul>			
anding	Host mx.chrispresso.com Protocol imap	Host mx.chrispresso.com Protocol smtp			
tem					
urity	Destination Group	Email Address			
et	Users	sales@chrispresso.com Edit			
		+ Add			
stem		Disable Delete			
scription					
egrations	New				
I.					



Email			
Accounts	Filter	Signatures	Settings
With filters yo	ı can e. g. dispa	tch new tickets into	o certain groups
New			

Group: Purchasing

**Note:** Note that the Group action only has an effect when the matching email results in a new ticket. Zammad will not change the group of existing tickets.

• Automatically increase the priority of tickets from a VIP customer:

From: contains: ourvipcustomer@example.com
Priority: 3 high

**Note:** Note that the Priority action only has an effect when the matching email results in a new ticket. Zammad will not change the priority of existing tickets.

• Automatically tag and close spam tickets that have been marked as spam by an external spam filter (e.g. SpamAssassin):

X-Spam-Flag: contains: YES Tag: add: spam State: closed

**Note:** Note that the State action only has an effect when the matching email results in a new ticket. Zammad will not change the state of existing tickets. It will add the tag though if it missing, even if the mail is an update to an existing ticket.

The following actions are only effective when creating tickets: Group, State, Priority, Owner.

Different attributes of a filter can be combined with each other. Likewise, the following actions can be combined. The supported matches are "contains" and "contains not"; for advanced matching, you can use regular expressions by prefixing the string with regex:.

Note that Zammad matches against the full header, e.g. for a mail with "From: Display Name <display. name@example.com>", the From condition will test against "Display Name <display.name@example.com>". This is especially important when using anchored regular expressions; regex:^display\. name@example.com\$ would not match this mail!

It should be borne in mind that the combined attributes build on each other. If a filter is no longer needed, it can either be temporarily set inactive or deleted directly.

# **19.3 Signatures**

You can create a separate signature for each group in Zammad. The individual signatures can be created and edited here:

Email		
Accounts Filter	Signatures Settings	
NAME	A	ACTION
default		
New		
Manage	Email	
Users	Accounts Filter Signatures Settings	
Groups	Autoulits Filler Signatures Settings	
Roles	NAME	A
Organizations	DE - Signature	
Overviews Text modules	First-Level-Support Signature	Ē
Macros	Sales Signature	8
Tags	Support-Signature	
Calendars	New	
SLAs		
Trigger		
Scheduler		
Report Profiles		
Time Accounting		
Channels		
Web		
Form		
Email		
Chat		

Afterwards, the existing (and active) signatures are available in the group editing mask:

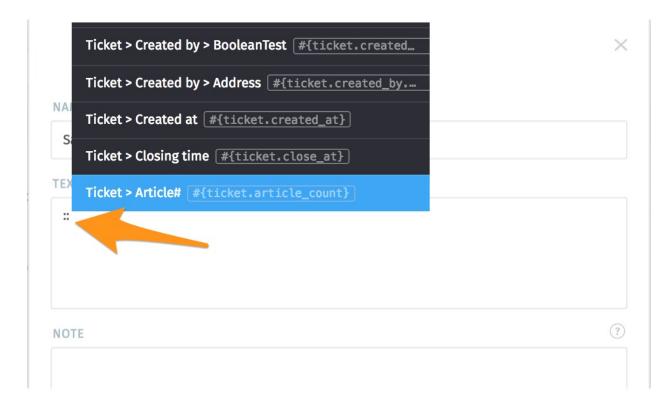
Manage	Groups Manage	mant	
Users	NAME	Edit: Group	×
Groups	2nd Level	NAME *	
Roles	Sales	Sales	
Organizations	Service Desk	ASSIGNMENT TIMEOUT	?
Overviews			
Text modules		FOLLOW UP POSSIBLE	(?)
Macros		yes	~
Tags		ASSIGN FOLLOW UPS	(?)
Calendars		yes	~
SLAs		EMAIL	
Trigger		-	~
Scheduler		-	
Report Profiles		2nd Level ✓ default	
Time Accounting		Sales Service Desk	
Channels		Standard Group/Pool for Tickets.	Ľ
Web			

Each group can be assigned its own signature, but they can also all use the same signature.

# **19.3.1 Dynamic Signatures**

To individualize the signatures, it is possible to automatically load specific information into a signature via *Variables*. All information stored on the ticket, assigned customers or agents can be inserted. This makes it possible to design the signature individually. To load a list of available variables, enter two colons (::) into the *Text* box of the signature editor.

**Hint:** Please keep in mind that specific information might not be available during ticket creation. The best example here is the ticket number / id. Specific information are created with submitting the ticket and thus are not available before submitting.



Here is an example of a signature with variables and the result when you write a mail:

TEXT	8	SUBJECT
Best Regards, #{ticket.owner.firstname} #{ticket.owner.lastname} Zammad #{ticket.created_by.department} For further questions I am available for you by telephone: #{ticket.owner.phone} or #{ticket.owner.mobile}		Best Regards, Christopher Miller Zammad Customer Support. For further questions 1 am available for you by telephone: +49 (0) 30 557 510-0 or +49 (0) 177 88 99 00
		select attachment

# 19.4 Settings

Below you can find the currently available Email related settings. Most of these settings have default values which can be found in this list as well.

Note: Some email-related settings are ticket based settings, which is why they can be found in the Composer Settings.

# 19.4.1 List of Settings

Notification Sender: Default value Notification Master <noreply@#{config.fqdn}> This is the default sender address for Zammad that affects all mails but those generated because of replies (like triggers or agent based mails). Your customers normally will not see this address. This email address does not need to receive and can't be assigned to a group.

Email	
Accounts Filter Signatures Settings	
Notification Sender	
Defines the sender of email notifications.	
Notification Master <noreply@#{config.fqdn}></noreply@#{config.fqdn}>	Submit
Additional follow-up detection By default the follow-up check is done via the subject of an email. With this setting yo which the follow-up check will be executed. Attachment - Search for follow-up also in attachments. Body - Search for follow-up also in mail body.	
□ References - Search for follow-up also in In-Reply-To or References headers.	Submit
Maximum Email Size Maximum size in MB of emails.	
10	✓ Submit

Note: This address is relevant for agent notifications and password reset mails (also affects customers).

Additional follow-up detection In some situations the normal follow-up detection is not enough. This might be due to missing references in the subject (the ticket hook and number). These options can help to recognize follow-ups to existing tickets.

Note: Please note that searching in attachment and body might lead to false follow-up detections.

Maximum Email Size: Default value 10 MB This one is pretty obvious: It defines the maximum allowed size of a Email Zammad will fetch. Zammad will not fetch Mails that are bigger than this option.

**Note:** Starting with Zammad 3.2 Zammad can provide postmaster mails (see "Send postmaster mail if mail too large" below).

Hint: This technically also affects attachments for articles.

#### Send postmaster mail if mail too large: Default value yes (enabled) on fresh installations and no (disabled) on upgrad

Note: This option is only available with Zammad 3.2 and later. Upgraded installations will, by default, have the value set to no (disabled).

**Option set to yes** This setting will cause Zammad to automatically reply to mails that exceed the above mail size limit with a postmaster style mail. This will help your user to understand that his mail did not arrive

and won't be reviewed by you.

**Note:** Zammad will still download and remove (if enabled) the mail from the mailbox. Instead of importing it to the database, it will save the affected mail to /opt/zammad/tmp/oversized\_mail/.

**Option set to no** If the option is set to no, Zammad will not reply to mails that are too big. Your customer will **not notice** that the mail was too large! Instead, Zammad will use the monitoring endpoint to alert its administrators that it can't fetch a too large mail.

Learn more about Monitoring.

- Sender based on Reply-To header: Default value not set (-) This setting decides how Zammad should recognize it's customers from Emails that contain a Reply-To header. This comes in useful if you're working with contact forms that need to use reply to headers.
  - **Option set to or Take reply-to header as sender/from of email** This setting will overwrite the initial FROM to the value used in Reply-To completely.
  - **Option set to Take reply-to header as sender/from of email and use realname of origin from** This setting will partially overwrite the initial FROM. It uses the mail address from the Reply-To header and uses the given name of the FROM header, if given.
- Customer selection based on sender and receive list: Default value yes This option decides how Zammad should react if an agent sends a Email to it.
  - **Option set to yes** Whatever the first user / Email address is set within the recipient list is will be used a ticket customer.
  - Option set to no The agent will be set as ticket customer.

**Note:** Currently agents can't be customers within the UI. While Email communication works, agents can't see their own tickets (as a customer) if they don't have access to the group.

**Block Notifications** With the regex that can be defined here, you can ensure not to send any notifications to specific systems. By default this especially affects typical system addresses which can't receive Emails any way.

The default value is: (mailer-daemon|postmaster|abuse|root|noreply|noreply.+? |no-reply|no-reply.+?)@.+?

Sender Format: Default value Agent + Format Seperator + System Address Display Name This configures the display name used in the FROM header of mails Zammad sends.

Note: This does not affect Notification mails (to agents) and password reset mails. Emails that are not sent by agents (e.g. trigger based notifications) will always fallback to System Address Display Name if needed.

**Option set to Agent + Format Seperator + System Address Display Name** This will cause Zammad to set the FROM header to agent name and the channels display name divided by a seperator (configured below).

Example: Christopher Miller via Chrispresso Inc..

**Option set to System Address Display Name** This will cause Zammad to always use the display name of the used channel in the FROM header.

Example: Chrispresso Inc.

- Sender Format Seperator: Default value via This is a can be a String you can freely choose. It divided the agents name and the display name of the channel when ever needed.
- **Ticket Subject Forward: Default value FWD** The above string will be used on the subject if you forward a mail from Zammad.

Note: : will be automatically appended to the above string.

Ticket Subject Reply: Default value RE The above string will be used on the subject if you reply to a mail from Zammad.

Note: : will be automatically appended to the above string.

**Ticket Subject Size: Default value 110** This setting enforces a maximum length for subjects when replying. If the subject you're using for your reply is too long, Zammad will automatically truncate the length and insert [...] to show it has shortened the subject.

Example: RE: Test somew[...] [Ticket#123456]

Note: This does not limit ticket titles within the UI, just the subjects during replying to an Email.

#### 19.4.2 Enhanced settings

Some less relevant settings can be changed via rails console if needed. As example Zammad allows you to send all outgoing communication to a BCC address for archiving reasons if needed. You can find the needed commands within the advanced customization settings.

# 19.5 Email header manipulation

Email header manipulation allows you to re-route or adjust tickets apart from filters or triggers. Like an API call, but with Emails.

Header checks are case insensitive.

#### Warning: Trusted channels required

Below options are a potential risk with external communication and thus require channels being set to trusted explicitly.

**Tip:** Below headers are examples and –in our opinion– the most relevant ones. However: You can adjust mostly any article or ticket attribute (yes, custom ones as well) if you know the attribute's exact name.

The name column within *object's management* provides easy access to objects attribute names.

### 19.5.1 Trigger auto responses

Normally Zammad runs internal checks to see if an Email is an automatic response. In these cases Zammad will not send trigger based responses.

There may be use cases where this behavior may be in your way, below options allow you to overcome this issue.

Note: In some cases combining below headers is crucial. This is intentional but may be confusing.

**x-zammad-send-auto-response** Set to false to disable trigger based responses. If set to true Zammad will send a response.

**Hint:** This option *does not* work if e.g. precedence: list is set unless you use below auto response header as well.

**x-zammad-is-auto-response** Providing this header allows you to tell Zammad that the mail in question is an auto generated response (true). This will cause Email based triggers to be skipped.

Set this header to false if you want to generate auto responses.

Tip: This header allows you to overwrite auto detects for e.g. precedence: list.

### 19.5.2 Ticket attributes

Zammad allows you to use headers to manipulate ticket creations or follow ups. The manipulation can be used instead of triggers. Triggers are considered *after* header settings and thus can still overrule.

Note: Zammad differentiates between ticket creation and follow up

For creations use: X-Zammad-Ticket-{Attribute Name}
For follow ups use: X-Zammad-Ticket-FollowUp-{Attribute Name}

This allows you to ensure the changes are only applied in the required situation.

#### Warning: About values

- While headers are not case sensitive, values like e.g. priority names are case censitive: 1 low will work, but 1 low will not!
- When using attributes that require date / time values, ensure to use Time Zoned Times. e.g. for 28th September 2021 on 8 am CEST, either use:
  - 2021-09-28T08:00:00+0200
  - 2021-09-28T08:00:00+02:00
  - 2021-09-28T06:00:00.000Z

X-Zammad-Ticket-Priority & X-Zammad-Ticket-FollowUp-Priority

Allows you to adjust a ticket's priority. Example: X-Zammad-Ticket-Priority: 1 low

#### X-Zammad-Ticket-Group & X-Zammad-Ticket-FollowUp-Group

Allows you interfere with regular channel routing of the ticket. Example: X-Zammad-Ticket-Group: Sales

#### X-Zammad-Ticket-Owner & X-Zammad-Ticket-FollowUp-Owner

Directly assign or change the ticket owner. Valid values are either login or Email Example: X-Zammad-Ticket-Owner: jdoe

#### X-Zammad-Ticket-State & X-Zammad-Ticket-FollowUp-State

Set a specific ticket state. Example: X-Zammad-Ticket-State: closed

#### Note:

Pending states always require the pending\_time attribute on top. Like so: X-Zammad-Ticket-Pending\_Time: 2021-09-26T08:00:00+0200

#### X-Zammad-Customer-Email

Manipulate the ticket customer - this can be a different user than the actual sender. Replying to the original sender is still possible.

Example: X-Zammad-Customer-Email: jdoe@example.com

Note: This header is not available for follow ups.

#### X-Zammad-Customer-Login

Manipulate the ticket customer - this can be a different user than the actual sender. Replying to the original sender is still possible.

Example: X-Zammad-Customer-Login: jdoe

Note: This header is not available for follow ups.

### 19.5.3 Article attributes

If needed Zammad allows you to manipulate attributes or states of fetched Email articles.

#### X-Zammad-Article-Sender

```
Manipulate the sender type (Agent, Customer, or System)
Example: X-Zammad-Article-Sender: System
```

**Warning:** System Emails are indicated in a similar way as trigger-response like entries Users can't see them natively.

X-Zammad-Article-Type

Change the article type of your incoming mail. This requires you to know which article types are available in your system.

Example: X-Zammad-Article-Type: phone

**Warning:** This header can cause *serious issues* in your instance and may lead to unexpected behavior. Only use with absolute care!

#### X-Zammad-Article-Internal

Manipulate the default article visibility. Example: X-Zammad-Article-Internal: true

#### X-Zammad-Ignore

Tell Zammad to silently drop the Email. Example: X-Zammad-Ignore: true

Control how Zammad sends and receives email.

#### Hint:

Using Gmail / G Suite? Set up a Google channel instead.

Using Microsoft 365? Set up a Microsoft 365 channel instead.

Channels	Email			
Web	Accounts Filter Signatures Settings			
Form				
Email	Fixed Email Accounts			
SMS	Chrispresso Helpdesk <chrispresso@zammad.com></chrispresso@zammad.com>			
Chat				
Telegram	Email Accounts			
Settings	• Inbound Edit	• Outbound Edit		
Branding	User sales@chrispresso.com Host mx.chrispresso.com Protocol imap	User sales@chrispresso.com Host mx.chrispresso.com Protocol smtp		
System				
Security	Destination Group	Email Address		
Ticket	Users	sales@chrispresso.com Edit + Add		
System		* Aug		
		Disable Delete		
Subscription				
Integrations	New			
API				

Accounts Connect Zammad to your email provider so that it can watch your inbox, send auto-replies, and more. (Self-hosted users may have already completed this step during new system setup.)

*Filters* Make sure new tickets show up in the right place with automated, if-this-then-that rules for all incoming email.

Signatures Customize signatures for all outgoing email.

Settings Manage options like:

- set the "From:" address on system notifications
- raise the limit on attachment sizes
- modify subject-line prefixes (*e.g.*, use "AW:" instead of "RE:")

Hint: Want to manually edit email subjects or always copy parent messages into your replies?

Check the Composer Settings.

Header manipulation Manipulate auto response behavior or incoming routing.

Warning: This is a very advanced topic.

# **19.6 Extra Options for Self-Hosted Users**

If you're too cool for POP3/IMAP/SMTP...

## 19.6.1 Watch your inbox with Fetchmail

Maybe you want to add emails via Fetchmail or Procmail to Zammad.

To get this to work you need to pipe your emails to rails.

Note: If you installed Zammad through a package manager (rather than from source), replace rails r with zammad run rails r below. To learn more, see Administration via Console.

#### **Command line**:

```
su - zammad
cd /opt/zammad
cat test/fixtures/mail1.box | rails r 'Channel::Driver::MailStdin.new(trusted: true)'
```

#### **Fetchmail**

#### Create .fetchmailrc:

```
su - zammad
cd ~
touch .fetchmailrc
chmod 0600 .fetchmailrc
```

#### vi .fetchmailrc:

```
#
# zammad fetchmail config
#
poll your.mail.server protocol POP3 user USERNAME pass PASSWORD mda "rails r
→'Channel::Driver::MailStdin.new(trusted: true)'"
```

That's it. Emails now will be directly piped into Zammad.

#### Using Procmail for advanced features like presorting

If you want to do some more with your emails, like presorting to a Zammad group or filtering spam, you can use Procmail.

Fetchmail config looks slightly different.

vi .fetchmailrc:

```
#
# zammad fetchmail config
#
poll your.mail.server protocol POP3 user USERNAME pass PASSWORD mda /usr/bin/procmail_
___is zammad here
```

Create .procmailrc:

su - zammad
cd ~
touch .procmailrc

vi .procmailrc:

```
# ---
# Pipe all emails into Zammad
# --
PATH=/opt/zammad/bin:/opt/zammad/vendor/bundle/bin:/sbin:/usr/sbin:/usr/sbin:/usr/bin:
SYS_HOME="/home/zammad"
RAILS_ENV=production
GEM_PATH=/opt/zammad/vendor/bundle/ruby/2.4.1/
LOGFILE="$SYS_HOME/procmail.log"
#VERBOSE="on"
:0 :
| rails r 'Channel::Driver::MailStdin.new(trusted: true)'
```

## 19.6.2 Dispatch messages with Sendmail

Warning: For the initial setup of this you need administrative rights on the Zammad machine (console).

If you try to configure **only** an outgoing email account (as in, you do not wish to set up an incoming IMAP/POP3 account at all), you will find that it's simply not possible via the email channel setup wizard. Instead, you will have to create it via the CLI.

(The wizard is designed to provide an idiot-proof email configuration process for the average, non-technical user, so certain advanced options and use cases have been deliberately omitted.)

To configure Zammad to use sendmail, run the following command (you can use rails r [...] if you installed Zammad from source):

Now, you should see a new Email Account entry in the admin settings panel:

Email	
Accounts Filter Signatures Settings	
Email Accounts	
Inbound User Host Protocol null	Outbound Protocol sendmail Email Address
Destination Group -	none + Add
	Disable Delete
New	

Fig. 6: Use the Add button under the Email Address heading to add new email addresses to send from.

# CHAPTER 20

# Chat

Chat has gotten very important for company and overall customer support. If used properly, support via chat can be a real efficiency booster. A downside of chats is when nobody responds or a bot responding to the customer.

# 20.1 How to improve Support by Chat?

We've asked others about their opinion in our circles, to learn what people expect or dislike. This is what we found out:

#### **Good experiences**

- Getting personal support by a human being
- · Getting a fast response
- · Solving my problem quickly

#### **Bad experiences**

- A chat window on a website (while the chat being offline) with the hint to "Leave a message"
- Long waiting queues before even writing with a personal
- Receiving a message like "My name is Nina, what can I do for you?" after sending a message with my issue.
- A Chat that doesn't integrate itself into the Website properly

# 20.2 Our answer: The Zammad Chat Widget

The task is clear: Work on the disadvantages of a regular support chat and improve them. Our approach is as follows:

• We'll only display the chat widget, if at least one agent is available and the agent still has capacity. - If no agent is online or the agents are absend, the chat won't be available

- We're setting an agent as inactive, if the agent doesn't accept new chat requests or the WebApp is offline. This way, your support staff can take breaks without your customers waiting ages for a reaction (see point above)
- Zammad does not respond to chat messages on it's own to ensure that there's no strange delay coming afterwards. Zammad will fire a (configurable by agent) auto response as soon as the agents accepts the Chat request.
- Zammad will try to adapt your main website colors to the chat. You can also adjust those colors allowing you to integrate the chat into your website, like it has been there before.

# 20.3 Configuration of the Chat widget

You can create chat widgets for your web pages to allow visitors to chat with you.

The area for configuring the chat can be found in the admin area at Channels -> Chat:

۹ کړ	Groups	С с	hat				
Dashboard	Roles			idaata fu	or your webpages to allow v	visitore to shot :	uith upu
	Organizations		eale chal w	nugets in	or your webpages to allow v	ISILOIS LO CIIAL V	with you.
Cverviews	Overviews	Topics	eate multip	lo chat t	opics		
Customer Chat	TextModules	CHATID	NAME		MAX. CLIENTS IN WAITLIST	DELETE	
	Macros		default	NOTE	5	Remove	
	Tags	1	detault			Remove	
	Calendars	+ Add Designer PREVIEW WIDTH IPhone 6 1:1 MacBook PREVIEW					
	SLAs						
	Trigger					MacRook	
	Scheduler					Macbook	
	Report Profiles						
	Channels	www.r	hb.ch				Load
			haetian Railv	vay		en	♠ ≰ Q ☰ Menu
	Web						
	Form						
	Email						
	Chat						
🋞 il. 🌣 🕂	Twitter			B	ernina Exp off		ecial

You can set up chats for different websites and edit them independently. The integrated designer helps the chat-widget to adapt to the website color. If you don't like the proposed design, you can manually adjust the design. Through the different previews you have the possibility to display directly how the presentation looks on different devices.

Q 🔰	Creating				
×2	Groups	Rhaetian Railway	en 者 👤 Q	≡ Menu	
🕜 Dashboard	Roles				
Overviews	Organizations				
	Overviews				
Customer Chat	TextModules	Bernina Ex	press special		
	Macros		ffer		
	Tags	CHF 129 / EUR 119 1	for two people with 👔 John Smith	• Online X	
	Calendars	Details	Buy tickets 📜 today 545	with your product.	
	SLAs	(R) Which see if our product?			
	Trigger		State -		
	Scheduler	in an and in	Ihre Nachriche	Send	
	Report Profiles	CHAT TITLE	BACKGROUND COLOR		
	Channels	<strong>Chat</strong> with us!	#e2011a	1	
	Web	Shown when the chat is closed.	Can be in any CSS color format.		
	Form	FONT SIZE	FLAT DESIGN		
	Email	12px			
	Chat	The default font size is 12px.			
🔬 il. 🔅 +	Twitter				

#### Usage

Insert the widget code into the source code of every page on which you want the chat to be visible on. It should be placed at the end of the page's source code before the </body> closing tag.

۹ 💦	Groups	Usage
Dashboard	Roles	Insert the widget-code into the source code of every page the chat should be visible on. It should be placed at the end of the page source code before the <a href="https://www.closing.tag">https://www.closing.tag</a> .
Overviews	Organizations	Requirements
	Overviews	Zammad Chat requires jQuery. If you don't already use it on your website include it like this:
Customer Chat	TextModules	<pre><script src="https://code.jquery.com/jquery-2.1.4.min.js"></script></pre>
	Macros	
	Tags	Auto-show chat (default) The chat will show up once the connection to the server got established and if there is someone online to
	Calendars	chat with.
	SLAs	<script src="http://localhost:3000/assets/chat/chat.min.js"></script> <script></td></tr><tr><td></td><td>Trigger</td><td><pre>\$(function() {     new ZammadChat({</pre></td></tr><tr><td></td><td>Scheduler</td><td><pre>background: '#e2011a', fontSize: '12px',</pre></td></tr><tr><td></td><td>Report Profiles</td><td>flat: true, chatId: 1</td></tr><tr><td></td><td>Channels</td><td><pre>}); }); </pre></pre></td></tr><tr><td></td><td>Web</td><td>Manually open chat</td></tr><tr><td></td><td>Form</td><td>If you want to open the chat by the press of a button set the option show to false and add the class</td></tr><tr><td></td><td>Email</td><td>open-zammad-chat to the button.</td></tr><tr><td></td><td>Chat</td><td><button class="open-zammad-chat">Chat with us</button></td></tr><tr><td>🛞 н. 🗢 +</td><td>Twitter</td><td><pre><script src="http://localhost:3000/assets/chat/chat.min.js"></script> <script> \$(function() {</pre></td></tr></tbody></table></script>

### Result

The final result will look like the following:



#### Requirements

Zammad chat requires jQuery. If you don't already use it on your website include it like this:

<script src="https://code.jquery.com/jquery-2.1.4.min.js"></script>

You have two options to implement the chat on your website:

- Automatically show chat (that's the default-setting)
- or manually open chat.

#### **Chat restrictions**

You offer a chat for your target group, but you don't want to activate chat for certain IP adresses or countries? Then you have the possibility to block the wished IP addresses and countries fast and easily via the chat configuration in the admin panel. The configuration panel looks like this:

۹ 🍂	Macros		
🖉 Dashboard	Tags		
	Calendars	MAX. CLIENTS IN WAITLIST *	
🔲 Customer Chat	SLAs	5 THED IPS (SEPARATED BY ;)	
📞 Phone 🚺 🔵	Trigger	127.0.0.1	
• Thanks! Great service!	Scheduler Report Pr	BLOCKED CONTRIES	
<ul><li>complaint wrong delivery of ord.</li><li>Order 887956</li></ul>	Time nting	Germany United Kingdom United States	Afghanistan Albania
<ul> <li>Awesome Customer Inc.</li> <li>Anna Lopez</li> </ul>	Chels Web		Algeria American Samoa MacBook Andorra
<ul> <li>Emily Adams</li> <li>Order 787556</li> </ul>	Form Email		Angola Anguilla Antarctica
	Chat		Antigua And Barbuda
	Twitter	active	×
	Facebook		
	Telegram	Cancel & Go Back	Submit
鼶 ili 🛸 🕂	Settings		

In the admin area you can also find more information about the customization of the chat.

# CHAPTER 21

# Google

# 21.1 Accounts

## 21.1.1 Register an OAuth App

Setting up a new Gmail / G Suite account? Because of Google's strict security policies, it's not as simple as entering your username and password.

First, you'll have to connect Zammad to your Google account as an **OAuth app** via the Google Developer settings panel. Once that's done, you'll be able to connect as many Gmail accounts to Zammad as you want, using only active Gmail browser sessions (no usernames or passwords required).

#### Note: What the heck is OAuth?

If you've ever used a website that lets you "Sign in with Google/Facebook/Twitter", you've used OAuth. OAuth is a way for you to let a third-party website see a tiny slice of your Google/Facebook/Twitter account data without giving them your password (which would let them see *everything*).

When a third-party website wants to use OAuth, it has to **register with the provider first** (*i.e.*, Google). This way, the provider knows who's receiving its users' data, and can give users a way to revoke access if they change their minds.

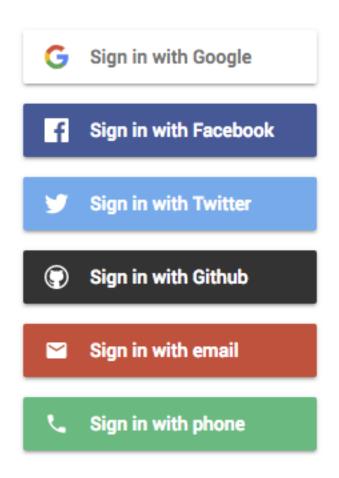
In this case, **Zammad is that third-party website**. That's why adding a Gmail account is a two-stage process: first, you have to register Zammad as a website that wishes to access Google user data; then, you have to add yourself as a Google user who agrees to let Zammad fetch your email.

#### Step-by-Step

To get started, head over to Google's Developer settings panel.

#### 1. Create a new project

For the purposes of this guide, a "project" and an OAuth app are the same thing. You may name it whatever you wish.



#### 2. Enable & add the Gmail API

Use the Enable APIs and Services button to start your search.

#### 3. Set up the OAuth consent screen

Configure who can use your app, what kind of access it's asking for, and a few fine print details (like a link to Zammad's privacy policy).

This information will be displayed in the process of connecting a Gmail account to Zammad, when users are redirected to Google for sign-in/confirmation.

#### User Type This option is only available to G Suite users.

If you have the option, choose **Internal** (unless you plan on creating channels for Gmail addresses from outside your G Suite domain).

#### Scopes for Google APIs Add Gmail API: https://mail.google.com.

#### 4. Generate OAuth credentials

Click on Create credentials > OAuth client ID to begin.

#### Application type Choose Web application.

#### Authorized redirect URIs E.g.,

external\_credentials/google/callback

https://your-domain.com/api/v1/

Find it in the Zammad admin panel under Channels > Google > Connect Google App > Your callback URL.

#### 5. Connect your Google app in Zammad

Copy your new OAuth app's credentials (client ID and client secret) into Zammad in the admin panel, under Channels > Google > Connect Google App.

Congratulations! Now you're ready to connect Gmail accounts to Zammad.

#### Troubleshooting

My OAuth credentials stopped working all of a sudden Did you recently reset your Google password?

(Google invalidates all your OAuth tokens whenever you change your password. Generate a new one per Steps 4 and 5 above.)

# 21.1.2 Account Setup

After you've *registered Zammad as an OAuth app* in your Google Developer settings, you can begin connecting Gmail accounts to Zammad.

But first, a word of warning! The import process does things you might not expect:

#### Danger: Zammad will delete all emails in your inbox during the import process.

Use the Keep Messages on Server setting to disable this behavior.

Warning: Zammad will send an auto-reply message to every email it imports. (Including the old ones!)

Make sure to *disable this behavior* prior adding an email account, and to turn it back on once all your messages have been imported.

#### Migrate an Existing Email Channel

If you've already added your Gmail account as a regular email channel, you'll have to convert it to a Google channel eventually: Google is planning to end support for simple password authentication in third-party email clients (like Zammad). **But there's no rush just yet**.

Upcoming versions of Zammad will feature an automated migration wizard to help you make the switch, and it'll be available well before Google officially pulls the plug on password auth.

**Hint:** If you'd prefer not to wait, you can do it manually today—just remember to **delete the email channel for your Gmail account** (and all its associated aliases) before re-adding it here.

Channels	Google		
Web			
Form	Accounts Filter Signatures Settings		
Email	Gmail Accounts	Configure App	Add Account
SMS			
Chat	Notice: Unassigned email addresses, assign them to a channel or delete them.		
Google	Chrispresso Team <sales@chrispresso.com> ×</sales@chrispresso.com>		
Telegram			
Sottings			

Fig. 1: Make sure you don't have any of these left over before creating your new Google channel.

#### Add a New Account

Click **Add Account** to connect your Gmail / G Suite accounts to Zammad. You will be redirected to a Google sign-in and confirmation page.

Any aliases registered in your Gmail settings will be imported automatically.

#### Note:

Google has a stringent verification process to protect users from third-party websites that use OAuth to access their data. Since you *are* the third-party website here, you can safely ignore this warning.



## This app isn't verified

This app hasn't been verified by Google yet. Only proceed if you know and trust the developer.

If you're the developer, submit a verification request to remove this screen. Learn more



BACK TO SAFETY

Google hasn't reviewed this app yet and can't confirm it's authentic. Unverified apps may pose a threat to your personal data. Learn more

Go to zammad.com (unsafe)

Time Accounting	Google			
Knowledge Base		Channel	×	
Channels	FOLDER			
Web	optional			Add Account
Form	KEEP MESSAGES ON SERVER			
Email	yes		~	
SMS				
Chat	Cancel & Go Back		Submit	Edit ×
Google			+ Add	Edit ×
Telegram			Dis	able Delete

#### Channel

Folder Specify which folder (or *label*) to fetch from, or leave empty to fetch from INBOX.

If specifying a nested folder, be sure to use the full path; *e.g.*, Inquiries/Tech-Support.

Keep messages on server Specify what happens to your emails after Zammad imports them:

- no Zammad deletes all imported messages
- · yes Zammad marks imported messages as read

(With this option, Zammad will only import unread messages. This means Zammad may miss messages if the mailbox is externally modified.)

#### Note: Why does Zammad delete messages by default?

If you never clean out your inbox, it'll eventually reach its storage limit, and your mail server will start **rejecting incoming messages**. Most Zammad users never even look at their inbox once it's set up, so they rely on Zammad to keep it clean for them.

If you choose **yes** here, remember that it's your responsibility to clean out your inbox from time to time to keep it below its storage limit.

#### Troubleshooting

I successfully added my account, but Zammad isn't fetching new email If you specified a *custom folder/label to fetch from*, are you sure incoming mail is arriving in that folder?

**Note:** Secondary addresses in Google channels work (almost) **just like they do in email channels**, so this article is lifted (almost) verbatim from *here*.

## 21.1.3 Secondary Addresses

Secondary addresses (also known as *aliases*) allow you to send emails with a different "From:" address from the one on the account.

Fig. 2: Once you add a secondary address, you can configure a group to start sending emails with it.

#### Warning: Secondary addresses must be added and verified in your Gmail settings first.

Gmail has its own process for adding and verifying aliases (under **Settings > Accounts and Import > Send mail as**). If you add an alias here before adding it in your Gmail settings, Google will refuse to dispatch it.

G Suite users may need to contact their administrators in order to add aliases in their Gmail settings.

Your email provider may also be set up to *receive incoming messages* for many addresses in the same mailbox. If this is the case, be sure to add your alternate inbox addresses here.

Display Name The display name used for outgoing email.

Email display names value can be further customized in the Settings tab.

	C C, D D :
🗹 ☆ Chrispresso Sales	Thanks for your inquiry (I have a question!) [Tick
🔲 ☆ ACME Supply Co.	Year-End Clearance Sale! Everything Must Go! -
🔲 ☆ George, Jasmine, Ash 3	When is everyone available to get together? - a $\boldsymbol{v}$

Fig. 3: A customer's inbox with an auto-reply from Chrispresso Sales.

Email The alias address to send outgoing messages as.

Channel The email account to be used when sending outgoing messages from this alias.

Note Optional. Only visible from this dialog, the REST API, and the Rails console.

**Note:** Managing accounts in Google channels is (almost) **just like it is in email channels**, so this article is lifted (almost) verbatim from *here*.

### 21.1.4 Managing Accounts

Once an account has been added, use the Accounts panel to edit its configuration.

Channels	Email			
Web	Accounts Filter Signatures Settings			
Form				
Email	Fixed Email Accounts			
SMS	Chrispresso Helpdesk <chrispresso@zammad.com></chrispresso@zammad.com>			
Chat				
Telegram	Email Accounts			
Settings	<ul> <li>Inbound Edit</li> <li>User sales@chrispresso.com</li> </ul>	<ul> <li>Outbound Edit</li> <li>User sales@chrispresso.com</li> </ul>		
Branding	Host mx.chrispresso.com Protocol imap	Host mx.chrispresso.com Protocol smtp		
System				
Security	Destination Group	Email Address		
Ticket	Users	sales@chrispresso.com Edit + Add		
System				
Subscription		Disable Delete		
Integrations	_			
API	New			

**Fetch Preferences** Click **Edit** on inbound account details to change how messages are retrieved from your account. See *New Account Settings* for a detailed description of each option.

Form	Google			
Email	Accounts Filter Signatures	Settings		
SMS				
Chat	Gmail Accounts		Configure App	Add Account
Google				
Telegram	Inbound Edit	<ul> <li>Outbo</li> </ul>	ound	
Settings	Destination Group	Email Ad	dress	
Branding	Sales	billing@cl	hrispresso.com	Edit $ imes$
		support@	chrispresso.com	Edit $ imes$
System		+ Add		
Security			Disable	Delete
Ticket				

Destination Group Click on the group name to reassign the account.

Email Accounts	
<ul> <li>Inbound Edit</li> <li>User sales@chrispresso.com</li> <li>Host mx.example.com</li> <li>Protocol imap</li> </ul>	<ul> <li>Outbound Edit</li> <li>User sales@chrispresso.com</li> <li>Host mx.example.com</li> <li>Protocol smtp</li> </ul>
Destination Group Sales	Email Address sales@chrispresso.com Edit
	+ Add
	Disable Delete

Only active groups will be displayed.

Changing this setting will not reassign existing tickets to the new group.

Hint: Still can't send outgoing email tickets? Check your group settings.

Email Address Use the + Add or Edit buttons to set up secondary addresses on this account.

See Secondary Addresses for a detailed description of each option.

#### Enabled / Disabled Disabling an account temporarily prevents Zammad from importing its messages.

This may be necessary during scheduled maintenance or when migrating your installation to a new host.

Inbound Edit	<ul> <li>Outbound Edit</li> </ul>	
User sales@chrispresso.com	User sales@chrispresso.com	
Host mx.example.com	Host mx.example.com	
Protocol imap	Protocol smtp	
Destination Group	Email Address	
Sales	sales@chrispresso.com	Edit
	+ Add	
	Disable	Delete

Note: Disabling an account disables outgoing messages for it, as well.

Delete Deleting an account removes its configuration from Zammad entirely.

#### Note: Additional Steps Required

Groups need an assigned an address to send outgoing emails. If you delete a group's assigned address, agents belonging to that group won't be able to send emails until you assign it a new one.

(There's no need to manage orphaned email addresses like you would on an email channel. In Google channels, aliases are connected to your Gmail account, which means they can be imported and purged automatically.)

*Register an OAuth App* Use the Connect Google App dialog to register Zammad as an OAuth app on Google.

(This step is required; read on to learn why.)

Account Setup Use the Add Account dialog to connect your account.

Secondary Addresses Send and receive email at additional email addresses, all through the same mailbox/account.

Managing Accounts Edit the configuration of existing accounts in the Accounts Panel.

Note: How do I use my Gmail account for outgoing system notifications?

On **subscription/cloud-hosted instances**, you can't. Notifications will always come from "Notification Master <nore-ply@your.zammad.domain>".

On **self-hosted instances**, we still don't recommend it. Using a Gmail account for automated, outgoing messages is risky: users who exceed Google's email sending limits can have their accounts suspended.

Set up a generic *email channel* instead, the use the *Email Notification* setting.

Note: Filters in Google channels are just like filters in email channels, so this article is lifted verbatim from here.

Form	Google			
Email	Accounts Filter Sig	natures Settings		
MS				
hat	Gmail Accounts		Configure App	Add Account
oogle				
elegram	• Inbound Edit	• Out	bound	
ettings	Destination Group	Email	Address	
randing	Sales	sales@	chrispresso.com	Edit ×
anung		billing	@chrispresso.com	Edit $ imes$
/stem		suppor	t@chrispresso.com	Edit $ imes$
ecurity		+ Add		
icket			Disable	Delete
5t				
System				

# 21.2 Filters

Email				
Accounts	Filter	Signatures	Settings	
With filters you	can e. g. dispat	tch new tickets into	o certain group	s or set a certain priority for tickets of a VIP customer.
				NO ENTRIES
New				

Postmaster filters allow you to match email headers (e.g. From, To, Subject, X-Spam-Flag etc.) and execute a set of actions whenever Zammad's email parser encounters a matching email. The actions will be applied to the ticket that is created or updated by this email. Here are some examples of what is possible with filters:

• Automatically dispatch tickets into certain groups:

For example, tickets from amazon.com could automatically be dispatched to the Purchasing group.

```
From: contains: regex: (\. | @) amazon\.com
Group: Purchasing
```

**Note:** Note that the Group action only has an effect when the matching email results in a new ticket. Zammad will not change the group of existing tickets.

• Automatically increase the priority of tickets from a VIP customer:

From: contains: ourvipcustomer@example.com Priority: 3 high

**Note:** Note that the Priority action only has an effect when the matching email results in a new ticket. Zammad will not change the priority of existing tickets.

• Automatically tag and close spam tickets that have been marked as spam by an external spam filter (e.g. SpamAssassin):

X-Spam-Flag: contains: YES Tag: add: spam State: closed

**Note:** Note that the State action only has an effect when the matching email results in a new ticket. Zammad will not change the state of existing tickets. It will add the tag though if it missing, even if the mail is an update to an existing ticket.

The following actions are only effective when creating tickets: Group, State, Priority, Owner.

Different attributes of a filter can be combined with each other. Likewise, the following actions can be combined. The supported matches are "contains" and "contains not"; for advanced matching, you can use regular expressions by prefixing the string with regex:.

Note that Zammad matches against the full header, e.g. for a mail with "From: Display Name <display. name@example.com>", the From condition will test against "Display Name <display.name@example.com>". This is especially important when using anchored regular expressions; regex:^display\. name@example.com\$ would not match this mail!

It should be borne in mind that the combined attributes build on each other. If a filter is no longer needed, it can either be temporarily set inactive or deleted directly.

**Note:** Signatures in Google channels are **just like signatures in email channels**, so this article is lifted verbatim from *here*.

# 21.3 Signatures

You can create a separate signature for each group in Zammad. The individual signatures can be created and edited here:

Email		
Accounts Filter	Signatures Settings	
NAME	A	ACTION
default		
New		
Manage	Email	
Users	Accounts Filter Signatures Settings	
Groups	Autoulits Filler Signatures Settings	
Roles	NAME	A
Organizations	DE - Signature	
Overviews Text modules	First-Level-Support Signature	Ē
Macros	Sales Signature	8
Tags	Support-Signature	
Calendars	New	
SLAs		
Trigger		
Scheduler		
Report Profiles		
Time Accounting		
Channels		
Web		
Form		
Email		
Chat		

Afterwards, the existing (and active) signatures are available in the group editing mask:

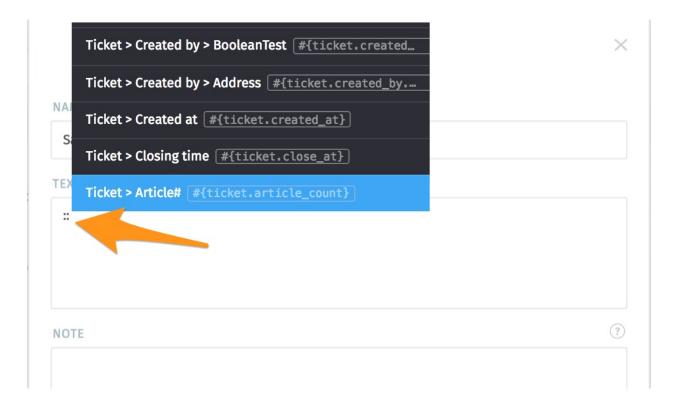
Manage	Groups Manage	nart	
Users	NAME	Edit: Group	×
Groups	2nd Level	NAME *	
Roles	Sales	Sales	
Organizations	Service Desk	ASSIGNMENT TIMEOUT	?
Overviews			
Text modules		FOLLOW UP POSSIBLE	?
Macros		yes	~
Tags		ASSIGN FOLLOW UPS	?
Calendars		yes	~
SLAs		EMAIL	
Trigger		-	~
Scheduler		-	
Report Profiles		2nd Level ✓ default	
Time Accounting		Sales Service Desk	0
Channels		Standard Group/Pool for Tickets.	
Web			

Each group can be assigned its own signature, but they can also all use the same signature.

### 21.3.1 Dynamic Signatures

To individualize the signatures, it is possible to automatically load specific information into a signature via *Variables*. All information stored on the ticket, assigned customers or agents can be inserted. This makes it possible to design the signature individually. To load a list of available variables, enter two colons (::) into the *Text* box of the signature editor.

**Hint:** Please keep in mind that specific information might not be available during ticket creation. The best example here is the ticket number / id. Specific information are created with submitting the ticket and thus are not available before submitting.



Here is an example of a signature with variables and the result when you write a mail:

TEXT	SUBJECT
Best Regards, #{ticket.owner.firstname} #{ticket.owner.lastname} Zammad #{ticket.created_by.department} For further questions I am available for you by telephone: #{ticket.owner.phone} or #{ticket.owner.mobile}	Best Regards, Christopher Miller Zammad Customer Support. For further questions I am available for you by telephone: +44 (01) 305 55 100-0 or +49 (0) 177 86 99 00:
	select attachment_

**Note:** Settings in Google channels are **just like settings in email channels**, so this article is lifted verbatim from *here*.

# 21.4 Settings

Below you can find the currently available Email related settings. Most of these settings have default values which can be found in this list as well.

Note: Some email-related settings are ticket based settings, which is why they can be found in the Composer Settings.

Email	
Accounts Filter Signatures Settings	
Notification Sender	
Defines the sender of email notifications.	
Notification Master <noreply@#{config.fqdn}></noreply@#{config.fqdn}>	Submit
Additional follow-up detection	
By default the follow-up check is done via the subject of an email. With this setting you can a which the follow-up check will be executed.	ldd more fields for
<ul> <li>Attachment - Search for follow-up also in attachments.</li> <li>Body - Search for follow-up also in mail body.</li> </ul>	
□ References - Search for follow-up also in In-Reply-To or References headers.	Submit
Maximum Email Size	
Maximum size in MB of emails.	
10 ~	Submit

### 21.4.1 List of Settings

Notification Sender: Default value Notification Master <noreply@#{config.fqdn}> This is the default sender address for Zammad that affects all mails but those generated because of replies (like triggers or agent based mails). Your customers normally will not see this address. This email address does not need to receive and can't be assigned to a group.

Note: This address is relevant for agent notifications and password reset mails (also affects customers).

Additional follow-up detection In some situations the normal follow-up detection is not enough. This might be due to missing references in the subject (the ticket hook and number). These options can help to recognize follow-ups to existing tickets.

Note: Please note that searching in attachment and body might lead to false follow-up detections.

Maximum Email Size: Default value 10 MB This one is pretty obvious: It defines the maximum allowed size of a Email Zammad will fetch. Zammad will not fetch Mails that are bigger than this option.

**Note:** Starting with Zammad 3.2 Zammad can provide postmaster mails (see "Send postmaster mail if mail too large" below).

Hint: This technically also affects attachments for articles.

Send postmaster mail if mail too large: Default value yes (enabled) on fresh installations and no (disabled) on upgrad

Note: This option is only available with Zammad 3.2 and later. Upgraded installations will, by default, have the value set to no (disabled).

**Option set to yes** This setting will cause Zammad to automatically reply to mails that exceed the above mail size limit with a postmaster style mail. This will help your user to understand that his mail did not arrive and won't be reviewed by you.

**Note:** Zammad will still download and remove (if enabled) the mail from the mailbox. Instead of importing it to the database, it will save the affected mail to /opt/zammad/tmp/oversized\_mail/.

**Option set to no** If the option is set to no, Zammad will not reply to mails that are too big. Your customer will **not notice** that the mail was too large! Instead, Zammad will use the monitoring endpoint to alert its administrators that it can't fetch a too large mail.

Learn more about Monitoring.

- Sender based on Reply-To header: Default value not set (-) This setting decides how Zammad should recognize it's customers from Emails that contain a Reply-To header. This comes in useful if you're working with contact forms that need to use reply to headers.
  - **Option set to or Take reply-to header as sender/from of email** This setting will overwrite the initial FROM to the value used in Reply-To completely.
  - **Option set to Take reply-to header as sender/from of email and use realname of origin from** This setting will partially overwrite the initial FROM. It uses the mail address from the Reply-To header and uses the given name of the FROM header, if given.
- Customer selection based on sender and receive list: Default value yes This option decides how Zammad should react if an agent sends a Email to it.
  - **Option set to yes** Whatever the first user / Email address is set within the recipient list is will be used a ticket customer.

Option set to no The agent will be set as ticket customer.

**Note:** Currently agents can't be customers within the UI. While Email communication works, agents can't see their own tickets (as a customer) if they don't have access to the group.

**Block Notifications** With the regex that can be defined here, you can ensure not to send any notifications to specific systems. By default this especially affects typical system addresses which can't receive Emails any way.

The default value is: (mailer-daemon|postmaster|abuse|root|noreply|noreply.+? |no-reply|no-reply.+?)@.+?

Sender Format: Default value Agent + Format Seperator + System Address Display Name This configures the display name used in the FROM header of mails Zammad sends.

Note: This does not affect Notification mails (to agents) and password reset mails. Emails that are not sent by agents (e.g. trigger based notifications) will always fallback to System Address Display Name if needed.

**Option set to Agent + Format Seperator + System Address Display Name** This will cause Zammad to set the FROM header to agent name and the channels display name divided by a seperator (configured below).

Example: Christopher Miller via Chrispresso Inc..

**Option set to System Address Display Name** This will cause Zammad to always use the display name of the used channel in the FROM header.

Example: Chrispresso Inc.

- Sender Format Seperator: Default value via This is a can be a String you can freely choose. It divided the agents name and the display name of the channel when ever needed.
- **Ticket Subject Forward: Default value FWD** The above string will be used on the subject if you forward a mail from Zammad.

**Note:** : will be automatically appended to the above string.

Ticket Subject Reply: Default value RE The above string will be used on the subject if you reply to a mail from Zammad.

**Note:** : will be automatically appended to the above string.

**Ticket Subject Size: Default value 110** This setting enforces a maximum length for subjects when replying. If the subject you're using for your reply is too long, Zammad will automatically truncate the length and insert [...] to show it has shortened the subject.

```
Example: RE: Test somew[...] [Ticket#123456]
```

Note: This does not limit ticket titles within the UI, just the subjects during replying to an Email.

### 21.4.2 Enhanced settings

Some less relevant settings can be changed via rails console if needed. As example Zammad allows you to send all outgoing communication to a BCC address for archiving reasons if needed. You can find the needed commands within the advanced customization settings.

**Note:** EMail header manipulation in Google channels work **just like in email channels**, so this article is lifted verbatim from *here*.

### 21.5 Email header manipulation

Email header manipulation allows you to re-route or adjust tickets apart from filters or triggers. Like an API call, but with Emails.

Header checks are case insensitive.

#### Warning: Trusted channels required

Below options are a potential risk with external communication and thus require channels being set to trusted explicitly.

**Tip:** Below headers are examples and –in our opinion– the most relevant ones. However: You can adjust mostly any article or ticket attribute (yes, custom ones as well) if you know the attribute's exact name.

The name column within *object's management* provides easy access to objects attribute names.

### 21.5.1 Trigger auto responses

Normally Zammad runs internal checks to see if an Email is an automatic response. In these cases Zammad will not send trigger based responses.

There may be use cases where this behavior may be in your way, below options allow you to overcome this issue.

Note: In some cases combining below headers is crucial. This is intentional but may be confusing.

**x-zammad-send-auto-response** Set to false to disable trigger based responses. If set to true Zammad will send a response.

Hint: This option *does not* work if e.g. precedence: list is set unless you use below auto response header as well.

**x-zammad-is-auto-response** Providing this header allows you to tell Zammad that the mail in question is an auto generated response (true). This will cause Email based triggers to be skipped.

Set this header to false if you want to generate auto responses.

Tip: This header allows you to overwrite auto detects for e.g. precedence: list.

### 21.5.2 Ticket attributes

Zammad allows you to use headers to manipulate ticket creations or follow ups. The manipulation can be used instead of triggers. Triggers are considered *after* header settings and thus can still overrule.

```
Note: Zammad differentiates between ticket creation and follow up
```

For creations use: X-Zammad-Ticket-{Attribute Name}
For follow ups use: X-Zammad-Ticket-FollowUp-{Attribute Name}

This allows you to ensure the changes are only applied in the required situation.

#### Warning: About values

• While headers are not case sensitive, values like e.g. priority names are case censitive: 1 low will work, but 1 low will not!

- When using attributes that require date / time values, ensure to use Time Zoned Times. e.g. for 28th September 2021 on 8 am CEST, either use:
  - 2021-09-28T08:00:00+0200
  - 2021-09-28T08:00:00+02:00
  - 2021-09-28T06:00:00.000Z

#### X-Zammad-Ticket-Priority & X-Zammad-Ticket-FollowUp-Priority

Allows you to adjust a ticket's priority. Example: X-Zammad-Ticket-Priority: 1 low

#### X-Zammad-Ticket-Group & X-Zammad-Ticket-FollowUp-Group

Allows you interfere with regular channel routing of the ticket. Example: X-Zammad-Ticket-Group: Sales

#### X-Zammad-Ticket-Owner & X-Zammad-Ticket-FollowUp-Owner

Directly assign or change the ticket owner. Valid values are either login or Email

Example: X-Zammad-Ticket-Owner: jdoe

#### X-Zammad-Ticket-State & X-Zammad-Ticket-FollowUp-State

Set a specific ticket state. Example: X-Zammad-Ticket-State: closed

#### Note:

Pending states always require the pending\_time attribute on top. Like so: X-Zammad-Ticket-Pending\_Time: 2021-09-26T08:00:00+0200

#### X-Zammad-Customer-Email

Manipulate the ticket customer - this can be a different user than the actual sender. Replying to the original sender is still possible.

Example: X-Zammad-Customer-Email: jdoe@example.com

Note: This header is not available for follow ups.

#### X-Zammad-Customer-Login

Manipulate the ticket customer - this can be a different user than the actual sender. Replying to the original sender is still possible.

Example: X-Zammad-Customer-Login: jdoe

Note: This header is not available for follow ups.

### 21.5.3 Article attributes

If needed Zammad allows you to manipulate attributes or states of fetched Email articles.

X-Zammad-Article-Sender

Manipulate the sender type (Agent, Customer, or System) Example: X-Zammad-Article-Sender: System

> Warning: System Emails are indicated in a similar way as trigger-response like entries Users can't see them natively.

#### X-Zammad-Article-Type

Change the article type of your incoming mail. This requires you to know which article types are available in your system. Example: X-Zammad-Article-Type: phone

Warning: This header can cause serious issues in your instance and may lead to unexpected behavior. Only use with absolute care!

#### X-Zammad-Article-Internal

Manipulate the default article visibility. Example: X-Zammad-Article-Internal: true

#### X-Zammad-Ignore

Tell Zammad to silently drop the Email. Example: X-Zammad-Ignore: true

Connect a Gmail or G Suite account to Zammad.

Form	Google			
Email	Accounts Filter Signatures	Settings		
SMS				
Chat	Gmail Accounts		Configure App	Add Account
Google				
Telegram	• Inbound Edit	• Outbo	ound	
Settings	Destination Group	Email Ad	ldress	
Branding	Sales	sales@ch	nrispresso.com	Edit ×
Stationis		billing@c	chrispresso.com	Edit ×
System		support@	ochrispresso.com	Edit ×
Security		+ Add		
Ticket			Disable	Delete
System				

Note: Google channels are a specialized kind of *email channel*.

If you're already familiar with email channels, you can skip most of this-but watch out for the "Accounts" section, which has a few extra quirks due to Google's strict security measures.

Accounts Connect Zammad to your email provider so that it can watch your inbox, send auto-replies, and more.

(Self-hosted users may have already completed this step during new system setup.)

*Filters* Make sure new tickets show up in the right place with automated, if-this-then-that rules for all incoming email.

Signatures Customize signatures for all outgoing email.

Settings Manage options like:

- set the "From:" address on system notifications
- raise the limit on attachment sizes
- modify subject-line prefixes (*e.g.*, use "AW:" instead of "RE:")

Hint: Want to manually edit email subjects or always copy parent messages into your replies?

Check the Composer Settings.

Header manipulation Manipulate auto response behavior or incoming routing.

Warning: This is a very advanced topic.

# CHAPTER 22

## Microsoft 365

### 22.1 Accounts

### 22.1.1 Register an OAuth App

Setting up a new Microsoft365 / Outlook account? Because of Microsoft's strict security policies, it's not as simple as entering your username and password.

First, you'll have to connect Zammad to your Microsoft account as an **OAuth app** via the Microsoft Azure Portal. Once that's done, you'll be able to connect as many Microsoft 365 accounts to Zammad as you want, using only active Microsoft 365 browser sessions (no usernames or passwords required).

#### Note: What the heck is OAuth?

If you've ever used a website that lets you "Sign in with Google/Facebook/Twitter", you've used OAuth. OAuth is a way for you to let a third-party website see a tiny slice of your Microsoft/Facebook/Twitter account data without giving them your password (which would let them see *everything*).

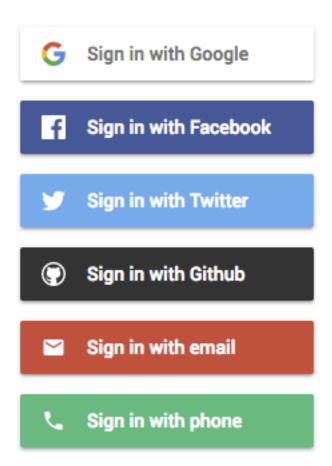
When a third-party website wants to use OAuth, it has to **register with the provider first** (*i.e.*, Microsoft). This way, the provider knows who's receiving its users' data, and can give users a way to revoke access if they change their minds.

In this case, **Zammad is that third-party website**. That's why adding a Microsoft account is a two-stage process: first, you have to register Zammad as a website that wishes to access Microsoft user data; then, you have to add yourself as a Microsoft user who agrees to let Zammad fetch your email.

#### Step-by-Step

To get started, head over to Microsoft's Azure Portal.

#### Note: Use an admin account for your organization.



Otherwise, an admin will have to approve your changes before they can take effect.

#### 1. Add an App Registration

Under **App Registrations > New Registration**, use the following:

**Supported account types** Choose the option that's right for your organization (or click *Help me choose...* if you're not sure).

- · Accounts in this organizational directory only (Default Directory only Single tenant)
- Accounts in any organizational directory (Any Azure AD directory Multitenant)
- Accounts in any organizational directory (Any Azure AD directory Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

Note: The "Personal Microsoft accounts only" option is not supported.

Redirect URI Web > E.g., https://your-domain.com/api/v1/external\_credentials/ microsoft365/callback

Find it in the Zammad admin panel under Channels > Microsoft 365 > Connect Microsoft 365 App > Your callback URL.

#### 2. Add API permissions

Under API Permissions > Add a permission > Microsoft Graph > Delegated permissions, add the following:

#### **OpenId permissions**

- email
- offline\_access
- openid
- profile

#### IMAP

• IMAP.AccessAsUser.all

#### SMTP

• SMTP.Send

#### 3. Connect your Microsoft app in Zammad

Copy your new app registration's **Application (client) ID** and **Directory (tenant) ID** (found under **Overview > Essentials**) into Zammad in the admin panel, under **Channels > Microsoft 365 > Connect Microsoft 365 App**.

Then, create a new client secret under **Certificates and Secrets > New Client Secret** and copy that into the Zammad admin panel, as well.

Congratulations! Now you're ready to connect Microsoft 365 or Outlook accounts to Zammad.

### 22.1.2 Account Setup

After you've *registered Zammad as an OAuth app* in your Azure Portal, you can begin connecting Microsoft accounts to Zammad.

But first, a word of warning! The import process does things you might not expect:

#### Danger: Zammad will delete all emails in your inbox during the import process.

Use the Keep Messages on Server setting to disable this behavior.

Warning: Zammad will send an auto-reply message to every email it imports. (Including the old ones!)

Make sure to *disable this behavior* prior adding an email account, and to turn it back on once all your messages have been imported.

#### Migrate an Existing Email Channel

If you've already added your Microsoft 365 account as a regular email channel, you'll have to convert it to a Microsoft 365 channel eventually: Microsoft is planning to end support for simple password authentication in third-party email clients (like Zammad). **But there's no rush just yet**.

Upcoming versions of Zammad will feature an automated migration wizard to help you make the switch, and it'll be available well before Microsoft officially pulls the plug on password auth.

**Hint:** If you'd prefer not to wait, you can do it manually today—just remember to **delete the email channel for your Microsoft account** (and all its associated aliases) before re-adding it here.

Form	Microsoft 365	
Email	Accounts Filter Signatures Settings	
SMS		
Chat	Microsoft 365 Accounts	Configure App Add Account
Google		
Microsoft 365	Notice: Unassigned email addresses, assign them to a channel or delete Chrispresso-Team <support@chrispresso.com></support@chrispresso.com>	e them.
Telegram		

Fig. 1: Make sure you don't have any of these left over before creating your new Microsoft 365 channel.

#### Add a New Account

Click **Add Account** to connect your Microsoft 365 / Outlook accounts to Zammad. You will be redirected to a Microsoft sign-in and confirmation page.

#### Note: Aliases are not imported automatically.

See Secondary Addresses to add them yourself.

#### Channel

Form	Microsoft 365				
Email	Channel	×			
SMS	FOLDER				
Chat			Арр	Add Account	
Google	KEEP MESSAGES ON SERVER				
Microsoft 365	yes	~			
Telegram					
Settings	Cancel & Go Back Subr	nit		Edit ×	
Branding	sales@chrispress	o.com		Edit × Edit ×	

Folder Specify which folder (or *label*) to fetch from, or leave empty to fetch from INBOX.

If specifying a nested folder, be sure to use the full path; e.g., Inquiries/Tech-Support.

Keep messages on server Specify what happens to your emails after Zammad imports them:

- no Zammad deletes all imported messages
- yes Zammad marks imported messages as read

(With this option, Zammad will only import unread messages. This means Zammad may miss messages if the mailbox is externally modified.)

#### Note: Why does Zammad delete messages by default?

If you never clean out your inbox, it'll eventually reach its storage limit, and your mail server will start **rejecting incoming messages**. Most Zammad users never even look at their inbox once it's set up, so they rely on Zammad to keep it clean for them.

If you choose **yes** here, remember that it's your responsibility to clean out your inbox from time to time to keep it below its storage limit.

#### Troubleshooting

I successfully added my account, but Zammad isn't fetching new email If you specified a *custom folder/label to fetch from*, are you sure incoming mail is arriving in that folder?

**Note:** Secondary addresses in Microsoft 365 channels work (almost) **just like they do in email channels**, so this article is lifted (almost) verbatim from *here*.

### 22.1.3 Secondary Addresses

Secondary addresses (also known as *aliases*) allow you to send emails with a different "From:" address from the one on the account.

Fig. 2: Once you add a secondary address, you can configure a group to start sending emails with it.

Warning: Secondary addresses must be added to your Microsoft account first.	
Personal accounts Use the Manage how you sign in to Microsoft panel at https://account.live.com.	
Hosted Exchange accounts In your Exchange admin center:	
1. select a user under <b>recipients &gt; mailboxes</b> ,	
2. edit it (double-click or ), and	
3. add an an alias under email address.	
Contact your administrator if you don't have access to an admin account.	

Your email provider may also be set up to *receive incoming messages* for many addresses in the same mailbox. If this is the case, be sure to add your alternate inbox addresses here.

Display Name The display name used for outgoing email.

	<b>G C</b> , <b>D D</b> :
🗹 ☆ Chrispresso Sales	Thanks for your inquiry (I have a question!) [Tick
ACME Supply Co.	Year-End Clearance Sale! Everything Must Go! -
🔲 ☆ George, Jasmine, Ash 3	When is everyone available to get together? - a $\boldsymbol{v}$

Fig. 3: A customer's inbox with an auto-reply from Chrispresso Sales.

Email display names value can be *further customized in the Settings tab*.

Email The alias address to send outgoing messages as.

Channel The email account to be used when sending outgoing messages from this alias.

Note Optional. Only visible from this dialog, the REST API, and the Rails console.

**Note:** Managing accounts in Microsoft 365 channels is (almost) **just like it is in email channels**, so this article is lifted (almost) verbatim from *here*.

### 22.1.4 Managing Accounts

Once an account has been added, use the Accounts panel to edit its configuration.

Channels	Email	
Web	Accounts Filter Signatures Settings	
Form		
Email	Fixed Email Accounts	
SMS	• Chrispresso Helpdesk <chrispresso@zammad.com></chrispresso@zammad.com>	
Chat		
Telegram	Email Accounts	
Settings	<ul> <li>Inbound Edit</li> <li>User sales@chrispresso.com</li> </ul>	Outbound Edit User sales@chrispresso.com
Branding	Host mx.chrispresso.com Protocol imap	Host mx.chrispresso.com Protocol smtp
System	· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·
Security	Destination Group	Email Address
Ticket	Users	sales@chrispresso.com Edit + Add
System		* Aud
Subscription		Disable Delete
Integrations	New	
API		

**Fetch Preferences** Click **Edit** on inbound account details to change how messages are retrieved from your account. See *New Account Settings* for a detailed description of each option.

Form	Microsoft 365			
Email	Accounts Filter Signatures Settings			
SMS				
Chat	Microsoft 365 Accounts		Configure App	Add Account
Google				
Microsoft 365	• Inbound Edit	Outbound		
Telegram		Email Address		
Settings	Sales	support@chrispresso.com		Edit ×
Settings		sales@chrispresso.com		Edit 🛛 🖂
Branding				
System			Delete	Disable
Security				

**Destination Group** Click on the group name to reassign the account.

Only **active** groups will be displayed.

Changing this setting will not reassign existing tickets to the new group.

Hint: Still can't send outgoing email tickets? Check your group settings.

Email Address Use the + Add or Edit buttons to set up secondary addresses on this account.

See Secondary Addresses for a detailed description of each option.

Email Accounts	
<ul> <li>Inbound Edit</li> <li>User sales@chrispresso.com</li> <li>Host mx.example.com</li> <li>Protocol imap</li> </ul>	• Outbound Edit User sales@chrispresso.com Host mx.example.com Protocol smtp
Destination Group Sales	Email Address sales@chrispresso.com Edit
	+ Add Disable Delete

Email Accounts	
<ul> <li>Inbound Edit</li> <li>User sales@chrispresso.com</li> <li>Host mx.example.com</li> <li>Protocol imap</li> </ul>	<ul> <li>Outbound Edit</li> <li>User sales@chrispresso.com</li> <li>Host mx.example.com</li> <li>Protocol smtp</li> </ul>
Destination Group Sales	Email Address sales@chrispresso.com Edit + Add
	Disable Delete

Enabled / Disabled Disabling an account temporarily prevents Zammad from importing its messages.

This may be necessary during scheduled maintenance or when migrating your installation to a new host.

Note: Disabling an account disables outgoing messages for it, as well.

Delete Deleting an account removes its configuration from Zammad entirely.

#### Note: Additional Steps Required

Groups need an assigned an address to send outgoing emails. If you delete a group's assigned address, agents belonging to that group won't be able to send emails until you assign it a new one.

*Register an OAuth App* Use the Connect Microsoft 365 App dialog to register Zammad as an OAuth app on Microsoft.

(This step is required; read on to learn why.)

Account Setup Use the Add Account dialog to connect your account.

Secondary Addresses Send and receive email at additional email addresses, all through the same mailbox/account.

Managing Accounts Edit the configuration of existing accounts in the Accounts Panel.

Note: How do I use my Microsoft 365 account for outgoing system notifications?

On **subscription/cloud-hosted instances**, you can't. Notifications will always come from "Notification Master <noreply@your.zammad.domain>".

On **self-hosted instances**, we still don't recommend it. Using a Microsoft account for automated, outgoing messages is risky: users who exceed Microsoft's email sending limits can have their accounts suspended.

Set up a generic *email channel* instead, then use the *Email Notification* setting.

**Note:** Filters in Microsoft 365 channels are **just like filters in email channels**, so this article is lifted verbatim from *here*.

### 22.2 Filters

Postmaster filters allow you to match email headers (e.g. From, To, Subject, X-Spam-Flag etc.) and execute a set of actions whenever Zammad's email parser encounters a matching email. The actions will be applied to the ticket that is created or updated by this email. Here are some examples of what is possible with filters:

• Automatically dispatch tickets into certain groups:

For example, tickets from amazon.com could automatically be dispatched to the Purchasing group.

From: contains: regex: (\. |@) amazon\.com

Form	Microsoft 365			
Email	Accounts Filter Signatures Se	ttings		
SMS				
Chat	Microsoft 365 Accounts		Configure App	Add Account
Google	a laborada am	- Only and		
Microsoft 365	• Inbound Edit	Outbound		
Telegram	Destination Group	Email Address		
Settings	Sales	support@chrispresso.com		Edit ×
Branding		sales@chrispresso.com + Add		Edit ×
System				
Security			Delete	Disable
Email				
Accounts Filter	Signatures Settings			
With filters you can e.g. dispatc	h new tickets into certain groups or set a certai	n priority for tickets of a VIP customer.		
	NO EI	NTRIES		
New				
Group: Purchasing	;			

**Note:** Note that the Group action only has an effect when the matching email results in a new ticket. Zammad will not change the group of existing tickets.

• Automatically increase the priority of tickets from a VIP customer:

From: contains:	ourvipcustomer@example.com
Priority: 3 high	

**Note:** Note that the Priority action only has an effect when the matching email results in a new ticket. Zammad will not change the priority of existing tickets.

• Automatically tag and close spam tickets that have been marked as spam by an external spam filter (e.g. SpamAssassin):

X-Spam-Flag: contains: YES Tag: add: spam State: closed

**Note:** Note that the State action only has an effect when the matching email results in a new ticket. Zammad will not change the state of existing tickets. It will add the tag though if it missing, even if the mail is an update to an existing ticket.

The following actions are only effective when creating tickets: Group, State, Priority, Owner.

Different attributes of a filter can be combined with each other. Likewise, the following actions can be combined. The supported matches are "contains" and "contains not"; for advanced matching, you can use regular expressions by prefixing the string with regex:.

Note that Zammad matches against the full header, e.g. for a mail with "From: Display Name <display. name@example.com>", the From condition will test against "Display Name <display.name@example.com>". This is especially important when using anchored regular expressions; regex:^display\. name@example.com\$ would not match this mail!

It should be borne in mind that the combined attributes build on each other. If a filter is no longer needed, it can either be temporarily set inactive or deleted directly.

**Note:** Signatures in Microsoft 365 channels are **just like signatures in email channels**, so this article is lifted verbatim from *here*.

# 22.3 Signatures

Email			
Accounts	Filter	Signatures	Settings
NAME			
default			
New			

You can create a separate signature for each group in Zammad. The individual signatures can be created and edited here:

Manage		
	Email	
Users	Accounts Filter (Signatures) Settings	
Groups	Accounts Filter Signatures Settings	
Roles	NAME	A
Organizations	DE - Signature	đ
Overviews	First-Level-Support Signature	đ
Text modules	Sales Signature	đ
Macros	Support.Signature	đ
Tags	New	
Calendars		
SLAs		
Trigger		
Scheduler		
Report Profiles		
Time Accounting		
Channels		
Web		
Form		
Email		
Chat		

Afterwards, the existing (and active) signatures are available in the group editing mask:

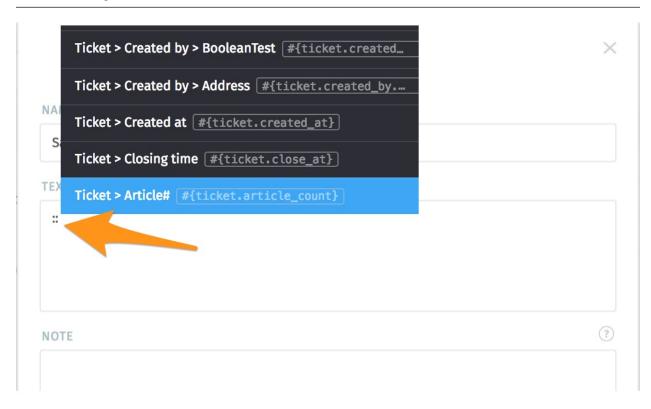
Manage	Groups Management				
Users	NAME	Edit: Group	×		
Groups	2nd Level	NAME *			
Roles	Sales	Sales			
Organizations	Service Desk	ASSIGNMENT TIMEOUT	(?)		
Overviews					
Text modules		FOLLOW UP POSSIBLE	?		
Macros		yes	~		
Tags		ASSIGN FOLLOW UPS	(?)		
Calendars		yes	~		
SLAs					
Trigger		EMAIL	~		
Scheduler			~		
Report Profiles		- 2nd Level			
Time Accounting		<ul> <li>✓ default</li> <li>Sales</li> <li>Service Desk</li> </ul>	Ð		
Channels		Standard Group/Pool for Tickets.			
Web					

Each group can be assigned its own signature, but they can also all use the same signature.

### 22.3.1 Dynamic Signatures

To individualize the signatures, it is possible to automatically load specific information into a signature via *Variables*. All information stored on the ticket, assigned customers or agents can be inserted. This makes it possible to design the signature individually. To load a list of available variables, enter two colons (::) into the *Text* box of the signature editor.

**Hint:** Please keep in mind that specific information might not be available during ticket creation. The best example here is the ticket number / id. Specific information are created with submitting the ticket and thus are not available before submitting.



Here is an example of a signature with variables and the result when you write a mail:

TEXT	SUBJECT
Best Regards, #{ticket.owner.firstname} #{ticket.owner.lastname} Zammad #{ticket.created_by.department} For further questions I am available for you by telephone: #{ticket.owner.phone} or #{ticket.owner.mobile}	Best Regards, Christopher Miller Zammad Customer Support For further questions I am available for you by telephone: + 46 (0) 305 57 160-0 or +49 (0) 177 88 99 00
	select attachment_

**Note:** Settings in Microsoft 365 channels are **just like settings in email channels**, so this article is lifted verbatim from *here*.

# 22.4 Settings

Email								
Accounts	Filter	Signatures	Settings					
Notification Sender								
Defines the send	er of email no	otifications.						
Notification Ma	Notification Master <noreply@#{config.fqdn}> Submit</noreply@#{config.fqdn}>							
Additional follow-up detection								
By default the follow-up check is done via the subject of an email. With this setting you can add more fields for which the follow-up check will be executed.								
<ul> <li>Attachment - Search for follow-up also in attachments.</li> <li>Body - Search for follow-up also in mail body.</li> </ul>								
□ References - Search for follow-up also in In-Reply-To or References headers. Submit								
Maximum Email Size								
Maximum size in MB of emails.								
10					~	Submit		

Below you can find the currently available Email related settings. Most of these settings have default values which can be found in this list as well.

Note: Some email-related settings are ticket based settings, which is why they can be found in the Composer Settings.

### 22.4.1 List of Settings

Notification Sender: Default value Notification Master <noreply@#{config.fqdn}> This is the default sender address for Zammad that affects all mails but those generated because of replies (like triggers or agent based mails). Your customers normally will not see this address. This email address does not need to receive and can't be assigned to a group.

Note: This address is relevant for agent notifications and password reset mails (also affects customers).

Additional follow-up detection In some situations the normal follow-up detection is not enough. This might be due to missing references in the subject (the ticket hook and number). These options can help to recognize follow-ups to existing tickets.

Note: Please note that searching in attachment and body might lead to false follow-up detections.

Maximum Email Size: Default value 10 MB This one is pretty obvious: It defines the maximum allowed size of a Email Zammad will fetch. Zammad will not fetch Mails that are bigger than this option.

**Note:** Starting with Zammad 3.2 Zammad can provide postmaster mails (see "Send postmaster mail if mail too large" below).

**Hint:** This technically also affects attachments for articles.

#### Send postmaster mail if mail too large: Default value yes (enabled) on fresh installations and no (disabled) on upgrad

Note: This option is only available with Zammad 3.2 and later. Upgraded installations will, by default, have the value set to no (disabled).

**Option set to yes** This setting will cause Zammad to automatically reply to mails that exceed the above mail size limit with a postmaster style mail. This will help your user to understand that his mail did not arrive and won't be reviewed by you.

Note: Zammad will still download and remove (if enabled) the mail from the mailbox. Instead of importing it to the database, it will save the affected mail to /opt/zammad/tmp/oversized\_mail/.

**Option set to no** If the option is set to no, Zammad will not reply to mails that are too big. Your customer will **not notice** that the mail was too large! Instead, Zammad will use the monitoring endpoint to alert its administrators that it can't fetch a too large mail.

Learn more about *Monitoring*.

- Sender based on Reply-To header: Default value not set (-) This setting decides how Zammad should recognize it's customers from Emails that contain a Reply-To header. This comes in useful if you're working with contact forms that need to use reply to headers.
  - **Option set to or Take reply-to header as sender/from of email** This setting will overwrite the initial FROM to the value used in Reply-To completely.
  - **Option set to Take reply-to header as sender/from of email and use realname of origin from** This setting will partially overwrite the initial FROM. It uses the mail address from the Reply-To header and uses the given name of the FROM header, if given.
- Customer selection based on sender and receive list: Default value yes This option decides how Zammad should react if an agent sends a Email to it.
  - **Option set to yes** Whatever the first user / Email address is set within the recipient list is will be used a ticket customer.

Option set to no The agent will be set as ticket customer.

**Note:** Currently agents can't be customers within the UI. While Email communication works, agents can't see their own tickets (as a customer) if they don't have access to the group.

**Block Notifications** With the regex that can be defined here, you can ensure not to send any notifications to specific systems. By default this especially affects typical system addresses which can't receive Emails any way.

The default value is: (mailer-daemon|postmaster|abuse|root|noreply|noreply.+? |no-reply|no-reply.+?)@.+?

Sender Format: Default value Agent + Format Seperator + System Address Display Name This configures the display name used in the FROM header of mails Zammad sends.

Note: This does not affect Notification mails (to agents) and password reset mails. Emails that are not sent by agents (e.g. trigger based notifications) will always fallback to System Address Display Name if needed.

**Option set to Agent + Format Seperator + System Address Display Name** This will cause Zammad to set the FROM header to agent name and the channels display name divided by a seperator (configured below).

Example: Christopher Miller via Chrispresso Inc..

**Option set to System Address Display Name** This will cause Zammad to always use the display name of the used channel in the FROM header.

Example: Chrispresso Inc.

- Sender Format Seperator: Default value via This is a can be a String you can freely choose. It divided the agents name and the display name of the channel when ever needed.
- **Ticket Subject Forward: Default value FWD** The above string will be used on the subject if you forward a mail from Zammad.

**Note:** : will be automatically appended to the above string.

Ticket Subject Reply: Default value RE The above string will be used on the subject if you reply to a mail from Zammad.

**Note:** : will be automatically appended to the above string.

**Ticket Subject Size: Default value 110** This setting enforces a maximum length for subjects when replying. If the subject you're using for your reply is too long, Zammad will automatically truncate the length and insert [...] to show it has shortened the subject.

Example: RE: Test somew[...] [Ticket#123456]

Note: This does not limit ticket titles within the UI, just the subjects during replying to an Email.

### 22.4.2 Enhanced settings

Some less relevant settings can be changed via rails console if needed. As example Zammad allows you to send all outgoing communication to a BCC address for archiving reasons if needed. You can find the needed commands within the advanced customization settings.

**Note:** EMail header manipulation in Microsoft 365 channels work **just like in email channels**, so this article is lifted verbatim from *here*.

# 22.5 Email header manipulation

Email header manipulation allows you to re-route or adjust tickets apart from filters or triggers. Like an API call, but with Emails.

Header checks are case insensitive.

#### Warning: Trusted channels required

Below options are a potential risk with external communication and thus require channels being set to trusted explicitly.

**Tip:** Below headers are examples and –in our opinion– the most relevant ones. However: You can adjust mostly any article or ticket attribute (yes, custom ones as well) if you know the attribute's exact name.

The name column within object's management provides easy access to objects attribute names.

### 22.5.1 Trigger auto responses

Normally Zammad runs internal checks to see if an Email is an automatic response. In these cases Zammad will not send trigger based responses.

There may be use cases where this behavior may be in your way, below options allow you to overcome this issue.

Note: In some cases combining below headers is crucial. This is intentional but may be confusing.

**x-zammad-send-auto-response** Set to false to disable trigger based responses. If set to true Zammad will send a response.

Hint: This option *does not* work if e.g. precedence: list is set unless you use below auto response header as well.

**x-zammad-is-auto-response** Providing this header allows you to tell Zammad that the mail in question is an auto generated response (true). This will cause Email based triggers to be skipped.

Set this header to false if you want to generate auto responses.

Tip: This header allows you to overwrite auto detects for e.g. precedence: list.

### 22.5.2 Ticket attributes

Zammad allows you to use headers to manipulate ticket creations or follow ups. The manipulation can be used instead of triggers. Triggers are considered *after* header settings and thus can still overrule.

Note: Zammad differentiates between ticket creation and follow up

```
For creations use: X-Zammad-Ticket-{Attribute Name}
For follow ups use: X-Zammad-Ticket-FollowUp-{Attribute Name}
```

This allows you to ensure the changes are only applied in the required situation.

#### Warning: About values

- While headers are not case sensitive, values like e.g. priority names are case censitive: 1 low will work, but 1 low will not!
- When using attributes that require date / time values, ensure to use Time Zoned Times. e.g. for 28th September 2021 on 8 am CEST, either use:

- 2021-09-28T08:00:00+0200

- 2021-09-28T08:00:00+02:00
- 2021-09-28T06:00:00.000Z

#### X-Zammad-Ticket-Priority & X-Zammad-Ticket-FollowUp-Priority

Allows you to adjust a ticket's priority.

Example: X-Zammad-Ticket-Priority: 1 low

#### X-Zammad-Ticket-Group & X-Zammad-Ticket-FollowUp-Group

Allows you interfere with regular channel routing of the ticket. Example: X-Zammad-Ticket-Group: Sales

#### X-Zammad-Ticket-Owner & X-Zammad-Ticket-FollowUp-Owner

Directly assign or change the ticket owner. Valid values are either login or Email Example: X-Zammad-Ticket-Owner: jdoe

#### X-Zammad-Ticket-State & X-Zammad-Ticket-FollowUp-State

Set a specific ticket state. Example: X-Zammad-Ticket-State: closed

#### Note:

Pending states always require the pending\_time attribute on top. Like so: X-Zammad-Ticket-Pending\_Time: 2021-09-26T08:00:00+0200

#### X-Zammad-Customer-Email

Manipulate the ticket customer - this can be a different user than the actual sender. Replying to the original sender is still possible.

Example: X-Zammad-Customer-Email: jdoe@example.com

**Note:** This header is not available for follow ups.

#### X-Zammad-Customer-Login

Manipulate the ticket customer - this can be a different user than the actual sender. Replying to the original sender is still possible.

Example: X-Zammad-Customer-Login: jdoe

Note: This header is not available for follow ups.

### 22.5.3 Article attributes

If needed Zammad allows you to manipulate attributes or states of fetched Email articles.

X-Zammad-Article-Sender

```
Manipulate the sender type (Agent, Customer, or System)
Example: X-Zammad-Article-Sender: System
```

**Warning:** System Emails are indicated in a similar way as trigger-response like entries Users can't see them natively.

#### X-Zammad-Article-Type

Change the article type of your incoming mail. This requires you to know which article types are available in your system.

Example: X-Zammad-Article-Type: phone

**Warning:** This header can cause *serious issues* in your instance and may lead to unexpected behavior. Only use with absolute care!

#### X-Zammad-Article-Internal

```
Manipulate the default article visibility.
Example: X-Zammad-Article-Internal: true
```

#### X-Zammad-Ignore

Tell Zammad to silently drop the Email.

Example: X-Zammad-Ignore: true

Connect a Microsoft 365 account (formerly "Office 365") to Zammad.

Form	Microsoft 365			
Email	Accounts Filter Signatures Settings			
SMS				
Chat	Microsoft 365 Accounts		Configure App	Add Account
Google				
Microsoft 365	• Inbound Edit	Outbound		
Telegram	Destination Group	Email Address		
Settings	Sales	support@chrispresso.com		Edit ×
0		sales@chrispresso.com		Edit 🛛 🕹
Branding		+ Add		
System			Delete	Disable
Security				

Note: Microsoft 365 channels are a specialized kind of *email channel*.

This documentation part does not cover user authentication.

If you're already familiar with email channels, you can skip most of this—but **watch out for the "Accounts" section**, which has a few extra quirks due to Microsoft's strict security measures.

Accounts Connect Zammad to your email provider so that it can watch your inbox, send auto-replies, and more.

(Self-hosted users may have already completed this step during new system setup.)

*Filters* Make sure new tickets show up in the right place with automated, if-this-then-that rules for all incoming email.

Signatures Customize signatures for all outgoing email.

Settings Manage options like:

- set the "From:" address on system notifications
- raise the limit on attachment sizes
- modify subject-line prefixes (e.g., use "AW:" instead of "RE:")

Hint: Want to manually edit email subjects or always copy parent messages into your replies?

Check the Composer Settings.

Header manipulation Manipulate auto response behavior or incoming routing.

Warning: This is a very advanced topic.

# CHAPTER 23

### Twitter

Zammad supports Twitter integration, meaning you can send and receive tweets and DMs just like emails!

		9/9 < >			
Q 🗡			Ticket ~		÷
Ø Dashboard			GROUP *		
Cverviews	Hi Zammad, thanks for unlocking my account!		Sales		>
Customer Chat			OWNER		
O Hi Zammad, thanks for unlockin	Hi Zammad, thanks for unlocking my account!		-		>
	🔒 set to internal 🦘 reply 🔥 split	v	STATE *		
	2 minutes ago	Ę	new		>
R	то	Ŷ	PRIORITY *		
	@medenhofer	Ť	2 normal		>
	You are welcome. Have a nice time!		TAGS + Add Tag LINKS + Add Link		
	/см 9962				
🛞 il. 🔅 +	Discard y	our unsaved changes.	Stay on tab \land	Update	^

Fig. 1: Twitter tickets will show a Twitter bird in the reply area. Just click on the reply button (as you would for an email) to tweet back.

**Note:** To set it up, follow the steps below:

1. Apply for a Twitter Developer account.

- 2. Create a new Twitter app for Zammad.
- 3. Set your new app's permissions to Read, write, and access direct messages.
- 4. Generate a new access token & secret.
- 5. Set up a dev environment for the Account Activity API.
- 6. Add your new Twitter app in Zammad.
- 7. Add your Twitter account in Zammad.
- 8. Configure filters for creating new tickets based on **#tags** and **@mentions**.

Read on for details about each step.

### 23.1 1. Apply for a Twitter Developer account

Use cases Products	Docs More Dask	nboard znuny ~ Znuny
Account / Get started		
now have access to new APIs, app manag Below are a few steps to help you create a If you're planning to use our standard API	ated a new Twitter developer account. With this account, you ment, and tools to facilitate and support development. n app and to get up and running with the new premium APIs. instead of our premium APIs, simply follow the steps below to tarted" guide in our documentation for next steps.	
y Helpful tools	Get started	
Dive into the docs	⊘ Build a team	^
View API usage	Invite colleagues to your developer account to collaborate on the development of your sol	ution.
Have a question?	⊘ Create an app	^

Fig. 2: This welcome page is displayed after completing the application for a Developer account.

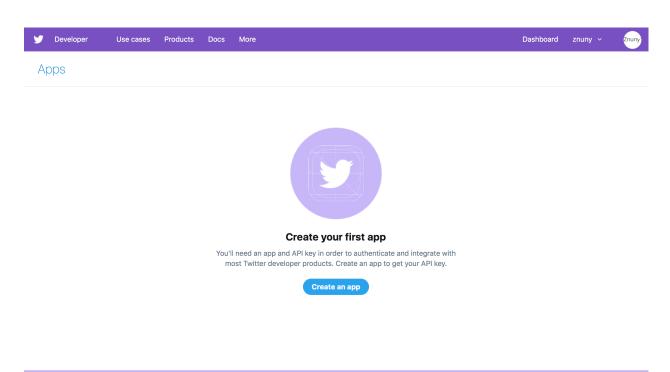
You will need a regular Twitter account with a verified phone number to apply for a Twitter Developer account (at https://developer.twitter.com).

During the application process, you will be asked to **Describe in your own words what you are building**. You may use the answer below:

```
    To manage customer service communications for our organization.
    No.
    Our use case involves posting original tweets in response to tweets and DMs we_

        →receive. We will not use the Twitter API to post or like "content".
    Our application will display individual tweets in their original form to_

        →authorized customer service agents of our organization only.
```



### 23.2 2. Create a new Twitter app for Zammad

Fig. 3: To create a new app, select Apps under your user menu, then click Create an app.

Once you have finished setting up your Developer account, use it to create a new Twitter app. The following fields are **required:** 

App name Must be unique across all of Twitter. No other developer account may create an app with the same name.

Application description Anything is fine here.

Website URL The URL of your Zammad instance.

This URL is also visible in the **Connect Twitter App** dialog of your Zammad admin settings panel.

Tell us how this app will be used Anything is fine here. We suggest the following:

This app will be used to manage Twitter communications between our customers and our organization's customer service agents on Zammad.

### 23.3 3. Set your new app's permissions

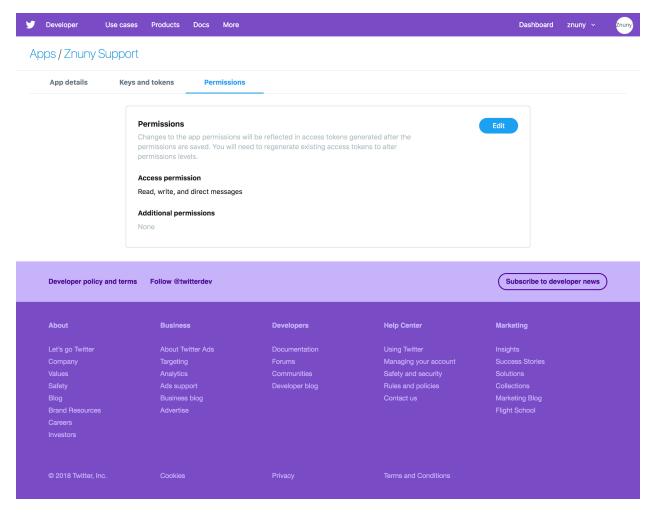


Fig. 4: Select Read, write, and access direct messages.

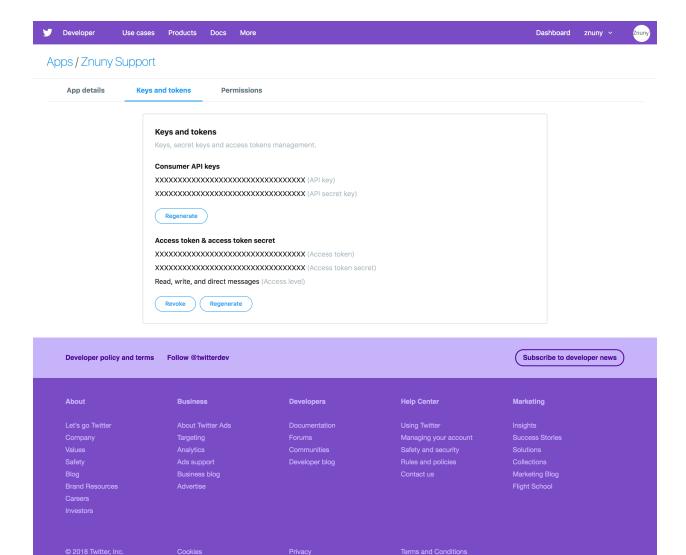


Fig. 5: You will need all four keys/tokens later, so don't close this tab.

### 23.4 4. Generate a new access token & secret

### 23.5 5. Set up a dev environment

After creating your app, set up a dev environment for the Account Activity API.

count				
			All of the subscription API packages sup	
pendent on the details of your iness @username's app).	r package), which can be used to i	isolate usage, rules, rate limits or	otherwise within your systems. (Note: it m	ay make the most sense to associate you
Search Tweets: 30-Da	ys / Sandbox			
Dev environment label	App Name		App owner	Delete environment
zammad	Znuny Sup	port	@znuny	
Search Tweets: Full Ar	chive / Sandbox			
Dev environment label	App Name		App owner	
zammad	Znuny Sup	port	@znuny	Delete environment
Account Activity API /	Sandbox App Name		App owner	
zammad	Znuny Sup	port	@znuny	Delete environment
Developer policy and terms	Follow @twitterdev			Subscribe to developer news
About	Business	Developers	Help Center	Marketing
Let's go Twitter	About Twitter Ads		Using Twitter	Insights
Company	Targeting		Managing your account	Success Stories
	Analytics	Communities	Safety and security	
Safety	Ads support	Developer blog	Rules and policies	Collections
	Business blog		Contact us	Marketing Blog
Brand Resources	Advertise			Flight School
Careers				

Fig. 6: Name it whatever you like (e.g., zammad). You will need the label later, so don't forget it.

۹ 🏄	Channels	Twitter Accounts
Dashboard	Web	You can connect Twitter Accounts with Zammad. You need to connect your Zammad with Twitter first.
: Overviews	Form	Connect Twitter App
	Email	
	SMS	
	Chat	
	Twitter	
	Facebook	
	Telegram	
	Settings	
	Branding	
	System	
	Security	
	Ticket	
	System	
🛞 il. 🔅 +	Integrations	
🛞 il. 🌣 🕂	API	

Fig. 7: Add your new Twitter app under **Channels > Twitter** in the admin settings panel. You will need the keys, tokens, and dev environment label from Steps 4 and 5.

Q 🔰	TextModules			
· · · · · · · · · · · · · · · · · · ·	Macros	Twitter Accounts	Configure App	Add Account
Dashboard	Tags			
Overviews	Calendars			
Customer Chat	SLAs			
	Trigger			
	Scheduler			
	Report Profiles			
	Channels			
	Web			
	Form			
	Email			
	Chat			
	Twitter			
	Facebook			
	Settings			
	Branding			
🛞 il. 🔅 +	System			

Fig. 8: Click Add Account under Channels > Twitter in the admin settings panel.

<b>y</b>	all of the second se
Authorize Zammad Support to your account?	o use
Authorize app Cancel	Zammad Support By Zammad zammad.com
This application will be able to:         • Read Tweets from your timeline.         • See who you follow, and follow new people.         • Update your profile.         • Post Tweets for you.         • Access your direct messages.	Zammad App to access Tweets, Mentions and Direct Messages.
<ul><li>Will not be able to:</li><li>See your Twitter password.</li></ul>	
You can revoke access to any application at any time from By authorizing an application you continue to operate under Twitter's Te Twitter, For more, see our Privacy Policy.	m the Applications tab of your Settings page. arms of Service. In particular, some usage information will be shared back with

Fig. 9: You will be redirected to Twitter and asked to authorize Zammad to access your account.

## 23.6 6. Add your new Twitter app in Zammad

### 23.7 7. Add your Twitter account in Zammad

### 23.8 8. Configure filters

That's it! Now, incoming tweets and DMs will be automatically turned into Zammad tickets.

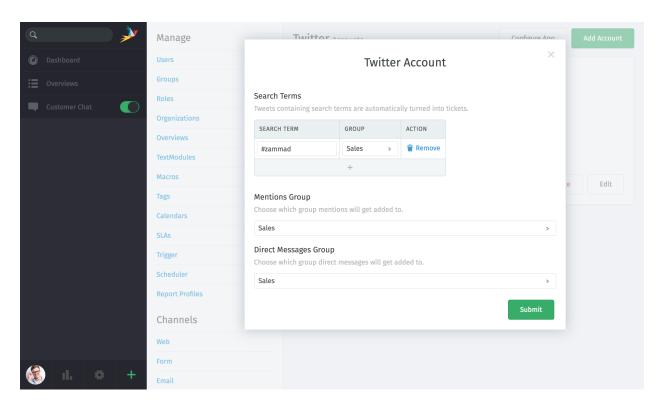


Fig. 10: Set up filters to automatically create new tickets based on #tags or @mentions.

# CHAPTER 24

### Facebook

**Hint:** Please note that this part of our documentation currently is outdated. We currently are working on solutions for this topic.

You can connect Facebook Accounts with Zammad. You need to connect your Zammad with Facebook first:

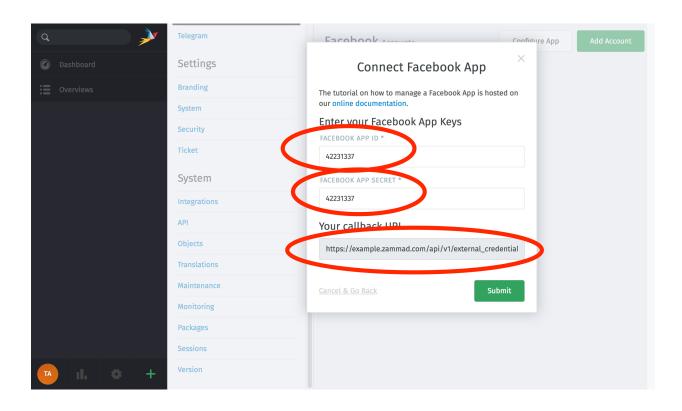
For this start at: https://developers.facebook.com/apps/

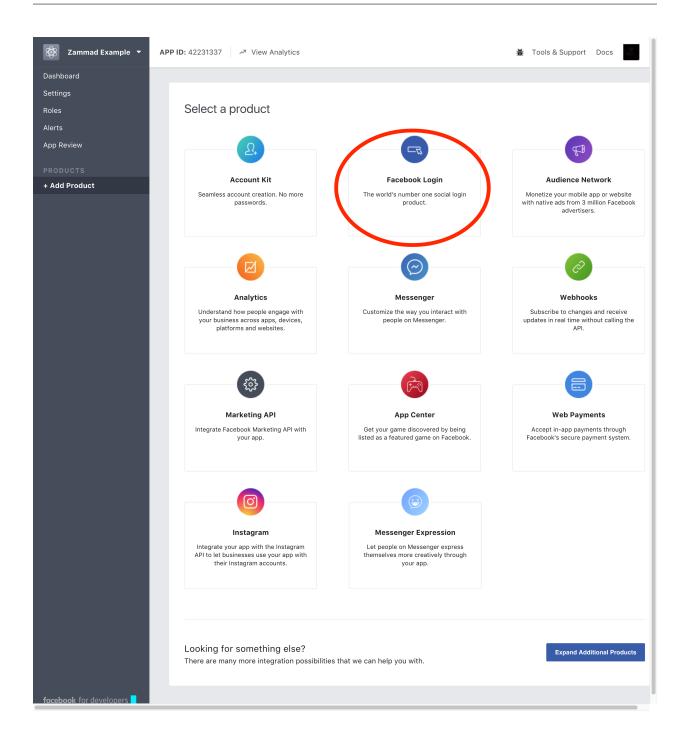
acebook for developers	Products Docs Tools &	Support News Videos		Create App
You currently have no	apps integrated with Facebook.			Create a New App
LANGUAGES				
			ês (Brasil) 中文(简体) 日本語	
Products	SDKs	Tools	Support	News
	JavaScript SDK	Object Browser		

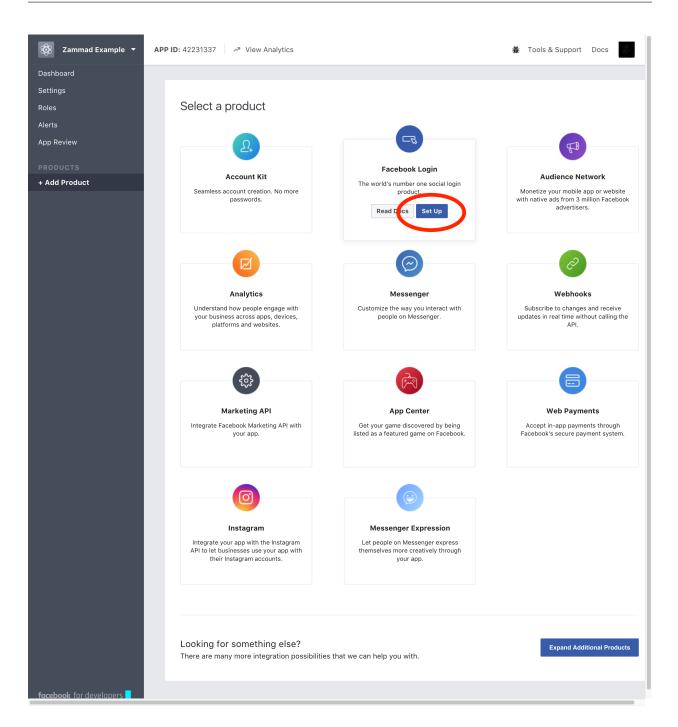
facebook for develope	rs Products Docs Tools & Support News Videos	Create App
You currently have	no apps integrated with Facebook.	Create a New App
LANGUAGES English (US) Deutsch Products	Create a New App ID Get started integrating Facebook into your app or website Display Name	
Facebook ogin Sharing ti Facebook Games Facebook App Mds	Zammad Example Contact Email support@zammad.com	admap ies
	By proceeding, you agree to the Facebook Platform Policies Cancel Create App ID	
_		_

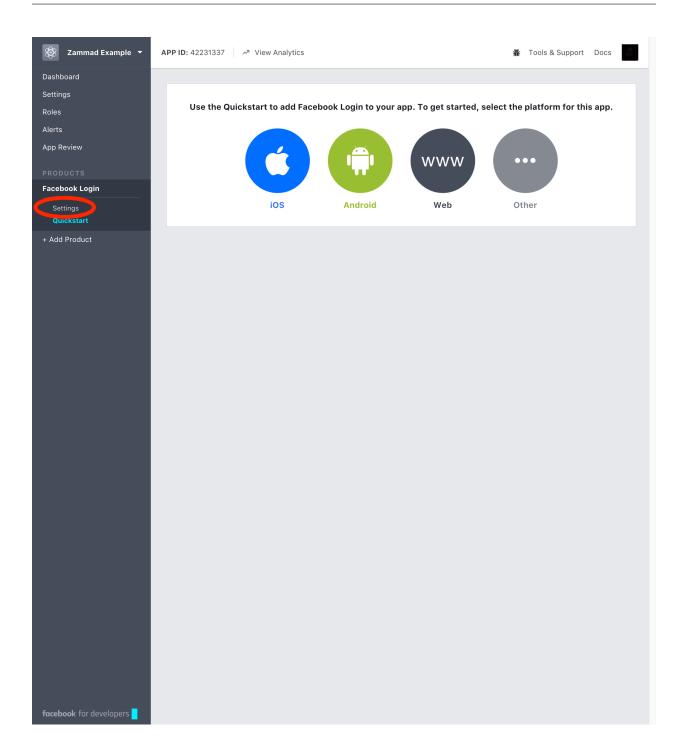
Click on "Create App ID" and enter app name

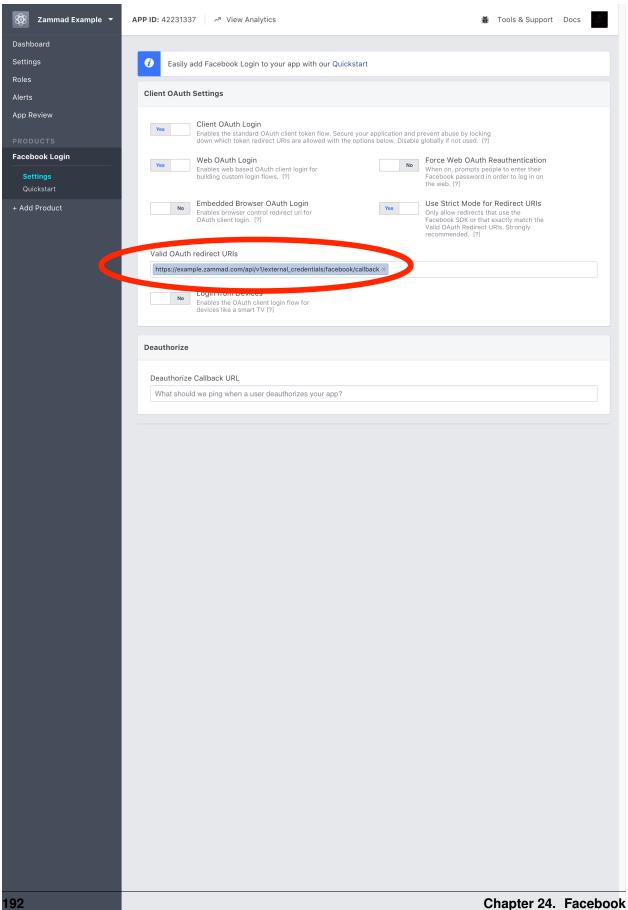
🔯 Zammad Example 🔻	APP ID: 42231337 AT View Analytics 🛣 Tools & Supp	port Docs
Dashboard		
Settings	Dashboard	
Roles		
Alerts	Zammad Example o	
App Review	This app is in development protocol by be used by app admins, developers and testers [?] API Version [?] App ID	
	v2.10 42231337	
+ Add Product	App Secret	
	••••••	Show
	Facebook Analytics	
	Set up Analytics	
	Analytics helps you grow your business and learn about the actions people take in your app. It only takes 5 minutes to set up.	ickstart Guide
	in you app. it only takes o minutes to set up.	
	Facebook Login	
	Active Login Users Trend	
		Monthly Active U
	1	Weekly Active Us
		Daily Active Users
	0 06 08 10 12 14 16 18 20 22 24 26 28 30	
	API Stats	
	Calls Errors Average Request Time	
		Calls
	0 06 08 10 12 14 16 18 20 22 24 26 28 30	
	° OCT	
	Application Level Rate Limiting	
		Last 24 Hours \$
		API Utilization
		Approaching Limit
	Your app has not made enough calls in last 24 hours to qualify for Rate Limiting	
		18
	0% Tue 2 PM Tue 5 PM Tue 0 PM Worl 12 AM Worl 4 AM Worl 7 AM Worl 11 AM Worl 2 PM	



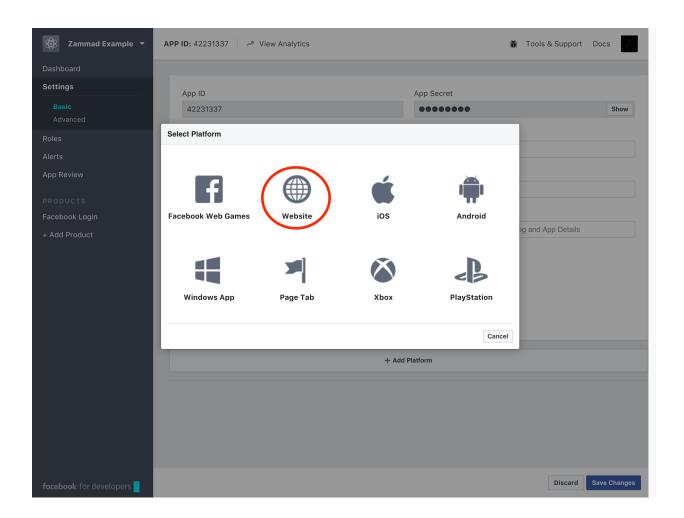








🔞 Zammad Example 👻	APP ID: 42231337 A View Analytics	🕷 Tools & Support Docs
Dashboard		
Settings	App ID	App Secret
<b>Basic</b> Advanced	42231337	Show
Roles	Display Name	Namespace
Alerts	Zammad Example	
App Review	App Domains	Contact Email
		support@zammad.com
PRODUCTS Facebook Login	Privacy Policy URL	Terms of Service URL
+ Add Product	Privacy policy for Login dialog and App Details	Terms of Service for Login dialog and App Details
	App Icon (1024 x 1024)	Category
	1024 × 1024	Choose a Category 🔻
		+ Add Platform
facebook for developers		Discard Save Chang



🔯 Zammad Example 🔻	APP ID: 42231337 AT View Analytics	叢 Tools & Support Docs
Dashboard		
Settings	App ID	App Secret
Basic Advanced	42231337	Show
Roles	Display Name	Namespace
	Zammad Example	
Alerts	App Domains	Contact Email
App Review	example.zammad.com	support@zammad.com
PRODUCTS	Privacy Policy URL	Terms of Service URL
Facebook Login	Privacy policy for Login dialog and App Details	Terms of Service for Login dialog and App Details
+ Add Product		
	App Icon (1024 x 1024)	Category Choose a Category 🔻
	(F)	choose a category +
	1024 x 1024	
	Website	Quick Start 🗙
	Site URL	
	https://example.zammad.com/	
		+ Add Platform
facebook for developers		Discard Save Changes

#### \*Configure Zammad as Facebook app\*

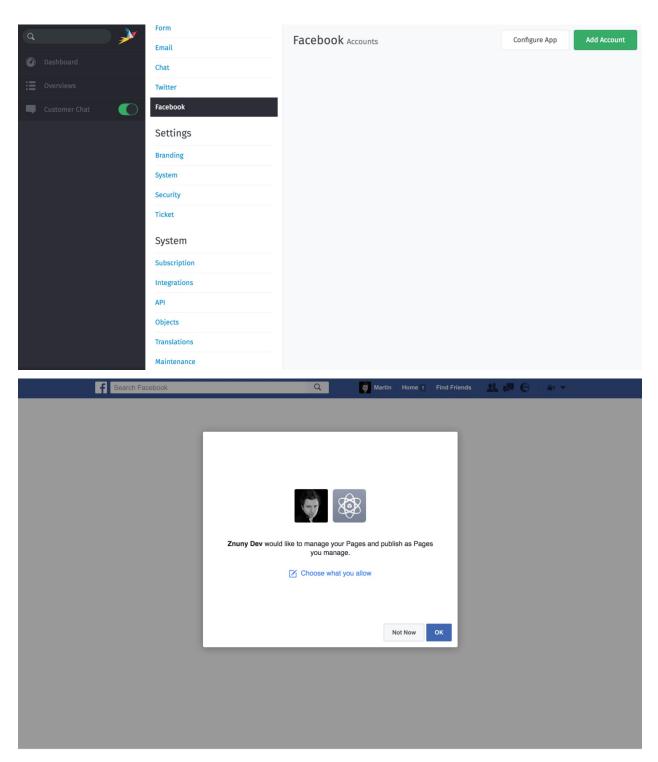
- Go to "Admin -> Channels -> Facebook"
- Click on "Connect Facebook App" and enter your "App ID", "App Secret" and verify the "Callback URL".

Done, your Zammad is configured as Facebook App now.

#### \*Link your Facebook Page to your Zammad Facebook app\*

Now you need to link your Facebook Page from which you want to get posts and send out comments.

Click on "Add Account", then you will see the authorize app page of Facebook. Click on "authorize app".



You will get redirected back to Zammad. Now you need to configure your search keys, where mentions should get routed.

۹ 🏄	Manage	Eacebook Annual Configure Ann	Add Account
Ø Dashboard	Users	Facebook Account	
E Overviews	Groups		
<b>Q</b> Customer Chat	Roles	Wall	
	Organizations	Choose which group page postings should go.	
	Overviews	Bob Smith	
	TextModules	- •	:_admin) :_admin)
	Macros		
	Tags	Pages	:_admin)
	Calendars	Choose which group page postings should go. Zammad	Edit
	SLAs	Users V	
	Trigger		
	Scheduler	Submit	
	Report Profiles		
	Channels		
	Web		

After you are done, you will get an overview of all linked Facebook Accounts.

۹ 🏄	Manage	Facebook Accounts	Configure App	Add Account
🖉 Dashboard	Users			
: Overviews	Groups	• Bob Smith100002186006963		
Customer Chat	Roles	Wall Bob Smith -> -		
	Organizations	Pages		
	Overviews	Zammad -> Users		
	TextModules	(ADMINISTER, EDIT_PROFILE, CREATE_CONTENT, MODERATE_CONT	FENT, CREATE_ADS, BASIC_	ADMIN)
	Macros		Delete	Edit
	Tags			
	Calendars			
	SLAs			
	Trigger			
	Scheduler			
	Report Profiles			
	Channels			
	Web			

#### \*Start using your new channel\*

Start and write a post to your page, short time later you will have a new ticket in Zammad.

Just click on the reply button (as you do it for emails) to send a comment.

## CHAPTER 25

Telegram

It's possible to put your Telegram bot communication into Zammad. To do so, you need to follow these steps.

Note: Your Zammad instance needs to be publicly available via HTTPS (we use Telegram WebHooks).

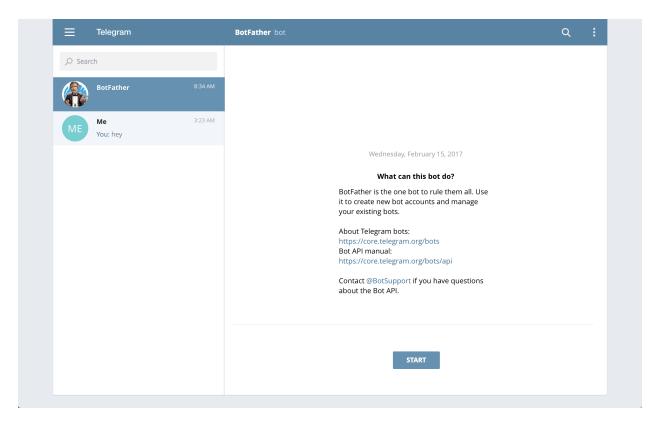
Warning: Zammad cannot receive file attachments larger than 20MB in Telegram messages.

This is a hard limit imposed by the Telegram Bot API.

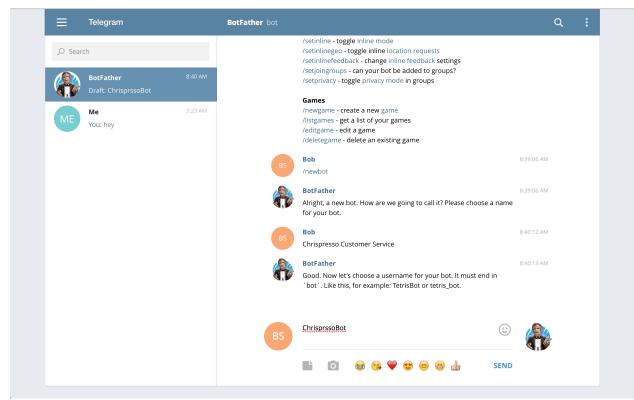
### 25.1 Register a Telegram bot app

Register your Telegram bot via your Telegram client, see also here: https://core.telegram.org/bots# 3-how-do-i-create-a-bot

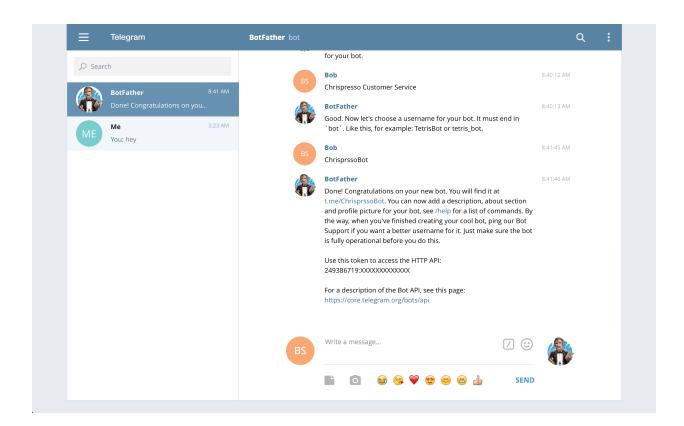
Go to BotFather



Register a new bot by using "/newbot" and define its name and username

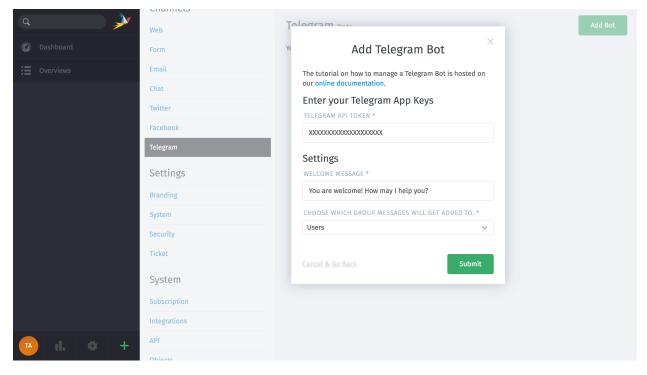


When you're all done, you will get your Telegram bot API token



### 25.2 Configure Zammad as Telegram bot

Go to "Admin -> Channels -> Telegram" and click "Add Bot"



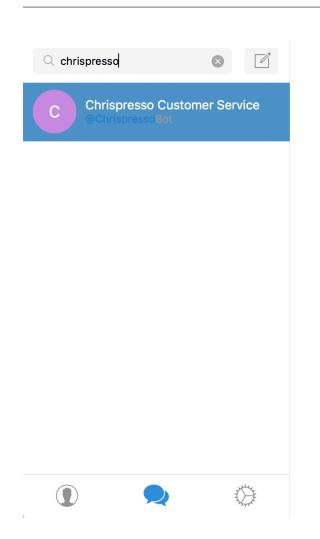
	Channets	
Q >	Web	Telegram Bots Add Bot
🕜 Dashboard	Form	Chierren Certer Conin Officiare Pat
	Email	Chrispresso Customer Service @ChrispressoBot
	Chat	Messages Group @ChrispressoBot Users
	Twitter	Delete Disable Edit
	Facebook	Detete Disable Eult
	Telegram	
	Settings	
	Branding	
	System	
	Security	
	Ticket	
	System	
	Subscription	
	Integrations	
🔼 il. 🔅 -	API	
	Objects	

Enter your "API Token", your "welcome message" and set the incoming group.

Done, your Zammad is now configured as a Telegram bot.

## 25.3 Start using your new channel

Go to your Telegram client, search for your new Telegram bot and start writing a message.



Select a chat to start messaging

Q Sea	rch	ľ	Close	Chrispresso Customer bot	Q	Edit
С	Chrispresso Customer So You are welcome! How ma help you?					
F	Felix rails c	<b>V</b> 10:30				
1	Zammad peep	17:20				
	BotFather 💸 You can use this token to access HTTP API: 2916078	16:17 32				
BS	Bob Smith hey	03:23				
тс	TechCrunch 🔗 Read it /here6	14:38	M	Martin /start Chrispresso Customer Service You are welcome! How may I help you?		12:43 12:43
R	Forbes 🤣 Let's get started. What ne	28/01/17 ws				
		$\bigcirc$	Ø	Write a message		Ŷ

Q Search		Close	Chrispresso Customer bot	Q	Edit
C C C C C C C C C C C C C C C C C C C					
F Felix rails c	<b>V</b> 10:30				
Zammad peep	17:20				
BotFather 😒 You can use this access HTTP AP					
Bob Smith hey	03:23	Ma /sta	r <b>tin</b> ırt	<i>√</i> //	12:43
TechCrunch 🤣	14:38		ispresso Customer Service are welcome! How may I help you	ı?	12:43
Read it /here6		Ma I ne	r <mark>tin</mark> ed a new product!	11	12:44
Forbes 😒 Let's get started.	28/01/17 What news				
		🖉 Wri	te a message		Q

After a few seconds a new message in Zammad appears.

x	channets		
٩ 🖌	Notifications 1	Bots	dd Bot
Dashboard	<u>Mark all as read</u>		
	Martin created Ticket I need a new product! just now	Group Group Users	
	Twitter		
	Facebook	Delete Disable Ed	dit
	Telegram Settings Branding System Security		
	Ticket System		
	Subscription		
	Integrations		
🔼 il. 🔅 +	API		
	Objects		

Just click on reply button (as you do it for emails) to send a reply.

Q   Image: Constraint of the second	I need a new product! Ticket# 19006 - created 1 hour 3 minutes ago	~	Ticket ~ owner - state * new		→
	I need a new product!     ▲       ▲ set to internal     ★ reply       ▲ split       1 hour 3 minutes ago	₽ †	PRIORITY * 2 normal TAGS + Add Tag LINKS + Add Link		~
	select attachment				
🔼 il. 🔅 🕂	Discard your unsaved cha	anges.	Stay on tab 🔺	Update	^

The message will appear in your Telegram client.

Q Search			Close	Chrispresso Customer bot	Q	Edit
	esso Customer Ser. ne? The blue one or ne?	12:46				
F Felix rails c	~	10:30				
Zammad peep	1	17:20				
	er 🔗 use this token to ITTP API: 29160782	16:17 	М	Martin /start	<i>√</i> /	12:43
BS Bob Smi	th	03:23	С	Chrispresso Customer Service You are welcome! How may I help you?		12:43
TechCru Read it /ł		14:38	M	Martin I need a new product! Chrispresso Customer Service		12:44 12:46
Forbes Let's get	2 started. What news	28/01/17		Which one? The blue one or the red one?	?	
			$\bigcirc$	Write a message		Ŷ

# CHAPTER 26

## Branding

*Product-name* Defines the name of the application, shown in the web interface, tabs and title bar of the web browser.*Organisation* Will be shown in the app and is included in email footers.*Logo* Defines the logo of the application, shown in the web interface.

*Pretty Date* Defines date format you like the most.

# CHAPTER 27

# System

For your overview we split each tab within system settings into its own page:

# 27.1 Base

#### Note: Self Hosted only

Below settings are only available to self hosted users. In hosted environments we're handling these settings for you to ensure service stability.

Fully Qualified Domain Name The URL of your Zammad installation.

This setting is used within Variables and notifications.

Note: This setting is automatically set by the Getting Started wizard.

Warning:

- Changing this setting also changes callback URLs for your channels etc.
- This setting can have negative affects on being able to login.
- **HTTP type** The HTTP type tells your installation how your clients connect. This is relevant for authentication and cookie security.

This setting is used within Variables and notifications.

Note: This setting is automatically set by the Getting Started wizard.

Warning:

- Changing this setting also changes callback URLs for your channels etc.
- This setting can have negative affects on being able to login.

**SystemID** This ID is being used within your ticket number. In case you're communicating with another ticket system with similar ticket number schemes this ID greatly reduces the risk of false follow ups.

The SystemID is randomly selected upon installation of Zammad (1-99).

**Warning:** Do not change this setting in a productive system! Your Zammad installation may no longer recognize old ticket number based follow ups upon change!

# **27.2 Services**

**Image Service: Default Image Service (active)** Defines the backend for user and organization image lookups.

- Geo Calendar Service: Default Geo Calendar Service (active) Defines the backend for geo calendar lookups. Used for initial calendar succession.
- Geo IP Service: Default Geo IP Service (active) Defines the backend for geo IP lookups. Shows also location of an IP address if an IP address is shown.
- Geo Location Service: Default Geo Location Service (active) Defines the backend for geo location lookups to store geo locations for addresses.

**Hint:** You can find a detailed privacy information on what we store for how long on our Privacy-Appendix inside of our System-Administrator-Documentation.

# 27.3 Storage

#### Note: Self Hosted only

Below settings are only available to self hosted users. In hosted environments we're handling these settings for you to ensure service stability.

Storage Mechanism This tells Zammad where to store attachments for tickets and knowledge base.

By default we're writing to the Database - you can switch to Filesystem at any time. If you chose filesystem, your files are written to /opt/zammad/fs/

**Note:** We strongly encourage you to use filesystem storage on busy instances. This will greatly improve system performance (de-crease database load and size).

Tip: Moving attachments from Database to Filesystem can be run during production use.

# 27.4 Network

#### Note: Self Hosted only

Below settings are only available to self hosted users. In hosted environments we're handling these settings for you to ensure service stability.

#### **Proxy Settings**

Note: The proxy settings can only be saved after successfully testing the proxy connection.

**Proxy Address** Allows you to provide a proxy server if needed. This is relevant for network communication by Zammad.

It does not affect the update process or Elasticsearch.

Username for proxy connection If your proxy server requires authentication, provide the username here.

Password for proxy connection If your proxy server requires authentication, provide the password here.

No proxy for the following hosts Exception list for hosts you can't or don't want to reach via proxy server.

**Default**: localhost, 127.0.0.0, ::1

# 27.5 Frontend

Send client stats: Default no (inactive) Send client stats/error message to central server to improve the usability. Client storage: Default no (inactive) Use client storage to cache data to enhance performance of application.

# 27.6 Console based settings

There's some console based settings we didn't put into the UI. However, you may find them helpful - you can find them in our hidden settings section.

# CHAPTER 28

# Security

For your overview we split each tab within security settings into its own page:

# 28.1 Base

# 28.1.1 New User Accounts

Activates the *register as a new customer* function on the login page. If set to no only administrators or agents can create new accounts manually.

Default setting: yes

#### Warning: This setting may be confusing

Deactivation of above function **does not** deactivate automatic account creation! This means: If a user writes e.g. an email to Zammad and has no account yet, Zammad will automatically create the account.

User accounts are a direct dependency of tickets and thus technically mandatory.

# 28.1.2 Lost Password

Activates the *lost password* function on the login page. If set to no only administrators may change the user's password - users may update their own password if they're still logged in and they have the required *permission*.

Default setting: yes

#### Tip: This function may be confusing

With third party authentications – but especially LDAP – you may want to disable this function. Zammad will not change third party login passwords and instead set or change the local password!

	T
USERNAME / E	MAIL
PASSWORD	
Remember r Sign in	ne
	registered with your email address if you've n in touch with our support team.
	Register as a new customer

	T
USERNAME / EMAIL	
PASSWORD	
Remember me	
Sign in	Forgot password?

# 28.1.3 Session Timeout

All settings below by default are set to 4 weeks. Session Timeout defines the life time of a users session. As soon as it's reached, Zammad will automatically log off the session in question.

Zammad takes the highest value set assigned for the user based on the permissions.

- 1. admin
- 2. ticket.agent
- 3. ticket.customer
- 4. default (fallback if user doesn't have above permissions set)

All settings act independently from each other allowing you to disable the timeouts for e.g. admins, but not agents.

#### Note: An example

Let's suppose you configured the following session timeouts

- default: 3 weeks
- admin: 2 weeks
- ticket.agent: 4 weeks
- ticket.customer: 1 week

#### This results in the following situations

- a user with admin permission will have a timeout of 2 weeks
- a user with admin and ticket.agent permissions will have a timeout of 2 weeks
- a user with ticket.customer permission will have a timeout of 1 week
- a user with neither admin, ticket.agent nor ticket.customer permissions will have a timeout of 3 weeks

# 28.2 Password

This section allows you to define password requirements for the local user accounts.

**Note:** Zammad does **not** allow you to change your LDAP password, instead, it will set a password in its local database which might confuse your users. This will be addressed in the future by #1169 and #2389.

#### Warning: Exception for strong passwords

Please note that below password policies *do not* affect administrators setting passwords on user accounts. While this seems strange and not safe we believe that an administrator knowing an user's password is insecure as well.

The suggested workflow is either:

- to use third party logins to not require local passwords at all or -
- to require your user to reset the password upon first login.

This way administrators are not required to set a user's password at all!

## 28.2.1 Maximum failed logins

You can choose a value between 4 and 20. This defines how often a login to a user account may fail until Zammad will lock it. Please note that via UI the only way to unlock a user account is to change the password (either as admin or via password reset function (if enabled)).

The default value is 10.

Note: You can also unlock an account via console or API.

# 28.2.2 2 lower and 2 upper characters

You can add complexity to passwords by enforcing at least 2 upper and lower case characters.

The default value is no.

## 28.2.3 Minimum length

This defines the minimum password length required for users to provide (from 4 to 20).

The default value is 6.

# 28.2.4 Digit required

This enforces your users to use at least one digit within the password.

The default value is yes.

# 28.3 Third-Party Applications

Third party authentication is a great way to help your users to login to Zammad more easily. If the account is yet unknown, Zammad will create a new user automatically, without the user needed to interact (e.g. type in his name). Another big advantage of this feature is that your user doesn't need to remember another password.

# 28.3.1 Facebook

It is possible to create a quick login for your helpdesk via Facebook To do so, you need to follow these steps:

#### **Register Facebook app**

Visit [https://developers.facebook.com/apps/] and click on "Add a new App"

<b>facebook</b> for develo	pers Products Docs	Tools & Support News Vid	eos	Q Search My Apps ▼ 11
Q Search apps	by title			+ Add a New App
÷	A.C. N. 1	Annual An	- E	Anterior State of Control State
		States	- 12	And an arrest of
LANGUAGES				
English (US) Deutsch	Italiano Français (France) P	усский <sup>الس</sup> ريبة Español Portuguê	s (Brasil)  中文(简体 ) 日本語	
Products	SDKs	Tools	Support	News
Facebook Login		Graph API Explorer	Platform Status	Blog
Sharing on Facebook Games	Android SDK JavaScript SDK	Open Graph Debugger Object Browser	Developers Group Marketing Partners	Developer Roadmap Case Studies
Facebook App Ads	PHP SDK	JavaScript Test Console	Bugs	Videos
	Unity SDK	API Upgrade Tool		
		Facebook Analytics		

# After that enter the app settings

🏓 Zammad Support 🔻	APP ID: 1632841320263280 🛛 🚜 View Analytics 🕺 🛣 Tools & Support Docs 👹
+ Create Test App	Dashboard
<ul> <li>Zhuny Dev</li> <li>Zammad Support</li> <li>Zhuny Team</li> <li>Zhuny</li> <li>Zhuny Support</li> <li>Create New App</li> <li>See All Apps</li> </ul>	Create a New App ID   Get started integrating Facebook into your app or website   Display Name   Zammad Support - Doc App   Contact Email   me@zammad.com   Category   Apps for Pages ▼
facebook for developers	By proceeding, you agree to the Facebook Platform Policies  Facebook Analytics for Apps  Set up Analytics Analytics for Apps helps you grow your business and learn about the actions people take in your app. It only takes 5 minutes to set up.  View Quickstart Quide
Tacebook for developers	Facebook Login

Navigate to "Settings" and fill in this infromation

#### Zammad

BuildCraft 3.0 Su 👻	APP 1D: 692782594263465 🧼 View Analytics	畫 Tools & Support Docs
Dashboard		
Settings	App ID App Secret	
	Show	
Advanced Roles	Display Name Namespace	
Alerts	BuildCraft 3.0 Support	
App Review	App Domains Contact Email	
	zammad com x admin@schlaubi.net	
+ Add Product	Privacy Policy URL Terms of Service URL Privacy policy for Login dialog and App Details Terms of Service for Login dialog and App Details	
	App Icon (1024 x 1024) Calegory Choose a Category * 1024 x 1024	
	Website Quick Start ×	
	Sile URL http://support.zammad.com/	
facebook for developers		Discard Save Chan

Navigate to app review and Check "Make [appname] public?"

🔯 BuildCraft 3.0 Su 👻	APP 1D: 692782594263465 🤲 View Analytics	🛔 Tools & Support Docs 📊
Dashboard Settings Roles Alerts App Review	Make Support public? Yes Your app is currently live and available to the public.	
PRODUCTS + Add Product	Submit Items for Approval Some Facebook Integrations require approval before public usage. Before submitting your app for review, please consult our Platform Policy and Review Guidelines.	
	Approved Items Init Loom Permit Isons e email Init & Provide access to the person's primary email address. This permission is approved by default.	
	public_profile III     Provides access to a person's basic information, including first name, last name, profile picture, gender and age range. This permission is approved by     default.     eruser_friends IVI     Provides access to a person's last of filends that also use your app. This permission is approved by default.	
facebook for developers		

#### Configure Zammad as Facebook app

Navigate to "Admin -> Security -> Third Party Applications" and enter the App ID and the App Secret. You can find this Key in the Dashbard of your Facebok app

Anmeldung über Facebook	
Aktivieren der Benutzeranmeldung über Facebook. Registriere Deine Anwendung zuers APP ID	t über Facebook Developer Site.
APP SECRET	Übermitteln

Now you can link accounts via "Avatar -> Profile -> Link Accounts" or login via Zammad login page.

# 28.3.2 GitHub

It is possible to create a quick login for your helpdesk via GitHub. To activate the quick login you need to enable OAuth for GitHub.

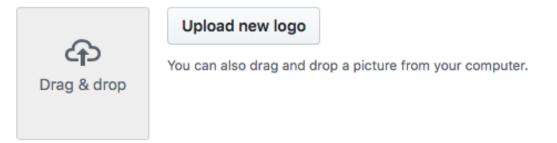
# **Register GitHub app**

Visit https://www.github.com/settings/applications/new and enter the app settings. As callback URL enter "https://zammad\_host/auth/github/callback" where zammad\_host has to be replaced with your Zammad FQDN

# 0 users

Client ID f301	
Client Secret 1363	
Revoke all user tokens	Reset client secret

# Application logo



# Application name

Zammad
--------

Something users will recognize and trust

# Homepage URL

https://myzammad.zammad.com

The full URL to your application homepage

# Application description

Very nice ticket system.

This is displayed to all users of your application

# Authorization callback URL

https://myzammad.zammad.com/auth/github/callback

28.3. Third-Party Applications 223

# Configure Zammad as GitHub app

Enter the "APP ID" and the "APP SECRET" from the GitHub OAUTH Applications Dashboard

Authentication via Github		
Enables user authentication via Github. Register your app first at Github OAuth Applications.		
f30		
APP SECRET		
	Submit	

After you configured the GitHub credentials and activated the login method, you should see a new icon on the login page.

USERNAME / EMAIL		
PASSWORD	•	
Remember me Sign in	OR SIGN IN USING	Forgot password?
GitHub	OR SIGN IN USING	

If you click on the icon you will be redirected to GitHub and see something similar to this:

	Authorize Zammad
S.	Zammad by hanneshal wants to access your hanneshal account
8	Public data only Limited access to your public data
	rizing will redirect to //myzammad.zammad.com
<u> </u>	ot owned or Created day ago Less than 10 GitHub GitHub
	Learn more about OAuth

When you grant the access you will be redirected to your Zammad instance and logged in as a customer. Now you can link accounts via "Avatar -> Profile -> Link Accounts" or login via Zammad login page.

# 28.3.3 Gitlab

It is possible to create a quick login for your helpdesk via Gitlab. To activate the quick login you need to enable OAuth for Gitlab.

#### **Register Gitlab app**

To register an app in Gitlab open your profile and select applications.

≡ 🦊 User Settings	Profile	Account	Applications	Chat	Access Tokens	Emails	Password	Notifications
Applications Manage applications that can use GitLab as an OAuth provider, and applications that you've authorized to use your account.	Name Zam Redire http: Use or Scope 2 api 2 rea 2 rea 2 ope	mad Helpde ect URI s://myzamm he line per L s Access you d_user Read d_registry I nid Authen	esk ad.zammad.com JRI r API d user informatic Read Registry ticate using Ope	n				
		nid Authen		nID Con	nect			

At the moment we need the "api" scope. This is caused due a bug in Gitlab: https://gitlab.com/gitlab-org/gitlab-ce/ issues/33022

# Configure Zammad as Gitlab app

Enter the "APP ID" and the "APP SECRET" from the Gitlab OAUTH Applications Dashboard.

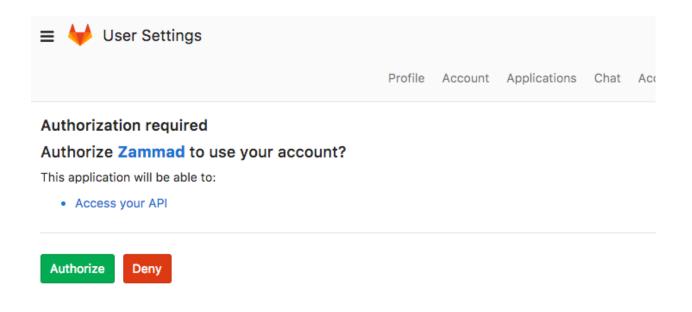
```
Note: Please ensure to use https://{git_host}/api/v4/ for site.
```

Authentication via Gitlab	
Enables user authentication via Gitlab. Register your app first at Gitlab Applications.	
APP ID	
APP SECRET	
SITE	
https://{gitlab-host}/api/v4/	Submit

After you configured the Gitlab credentials and activated the login method, you should see a new icon on the login page.

USERNAME / EMAIL		
PASSWORD		
Remember me Sign in		Forgot password?
	OR SIGN IN USING	<u>101301 patomoral</u>
GitLab		

If you click on the icon you will be redirected to Gitlab and see something similar to this:



When you grant the access you will be redirected to your Zammad instance and logged in as a customer. Now you can link accounts via "Avatar -> Profile -> Link Accounts" or login via Zammad login page.

# 28.3.4 Google

With some easy and fast steps, you can enable Zammad to authenticate your users via Google.

**Hint:** Prior Zammad 2.9 it was necessary to activiate the Google+ API - it's deprecated, thus this authentication will only work with Zammad 2.9 and later.

# **Register a Google app**

First of all, we need to create a new project - you can skip this step if you already have one.

Hint: Use this link to create a new project: https://console.cloud.google.com/projectcreate

Now expand the menu, expand "APIs & Services" and select "Credentials". Go to the tab "OAuth consent screen" first and ensure to fill in the requested information - without doing so you can't create credentials!

≡	Google APIs 🔹	- instanti		٩
API	APIs & Services	Credentials		
<\$>	Dashboard	Credentials OAuth consent screen Domain verification		
Ш	Library	Before your users authenticate, this consent screen will allow them to choose whether they want to grant access to their private data, as well as give them a link to your terms of service and privacy policy. This page configures the consent screen for all applications in this project.		About the consent screen
0+	Credentials			The consent screen tells your users who is requesting access to their data and what kind of data you're asking to access.
		Verification status Not published		OAuth Developer Verification
		Application name @ The name of the app asking for consent Zammad		To protect you and your users, your consent screen may need to be verified by Googie. Without verification, your users will be an additional page indicating that your app is not verified by Googie. Learn more
		Application logo  An image on the content screen that will help users recognize your app Local file for upload Bro	owse	Verification is required if: • Your application type is public, and • You add a sensitive scope
				Verification may take several days to complete. You will receive email updates as it's processed.
		Support email @ Shown on the consent screen for user support	•	Saving without publishing Even though your consent screen is unpublished, you can still test your application with users with the following limitations:
		Scopes for Google APIs Scopes allow your application to access your user's private data. Learn more If you add a sensitive scope, such as accepts that give you full access to Gmail or Drivi Google will verify your consent screen before its published.	re,	<ul> <li>Sensitive scopes are limited to 100 grant requests before verification is required</li> <li>Users see an additional page indicating that your app is not verified by Google</li> </ul>
		email		Let us know what you think about our OAuth experience.
		profile openid		
		Add scope		
		Authorized domains  To protect you and your uses, Google only allows applications that authenticate using Okuth to use Authorized Domains. Your applications' links must be hosted on Authori. Domains. Learn more		

After filling in and saving the consent screen information, you can change to "Credentials" tab and create new "OAuth client ID"-Credentials.

Fill in the neceassary information, for restrictions you need the following (replace <code>zammad\_host</code> with your FQDN):

Aplication type [x] Web application

Authorized JavaScript origins https://zammad\_host/

Authorized redirect URIs https://zammad\_host/auth/google\_oauth2/callback

	٩
← Create OAuth client ID	
For applications that use the OAuth 2.0 protocol to call Google APIs, you can use an OAuth 2.0 client ID to generate an access token. The token contains a unique identifier. See Setting up OAuth 2.0 for more information.	
Application type  Web application Android Learn more Chrome App Learn more iOS Learn more Other	
Name 🔞	
Zammad-Login	
Restrictions Enter JavaScript origins, redirect URIs, or both Learn More Origins and redirect domains must be added to the list of Authorized Domains in the OAuth consent settings.	
Authorized JavaScript origins For use with requests from a browser. This is the origin URI of the client application. It can't contain a wildcard (https:// example.com) or a path (https://example.com/subdir). If you're using a nonstandard port, you must include it in the origin URI.	
https://c	
https://www.example.com	
Authorized redirect URIs For use with requests from a web server. This is the path in your application that users are redirected to after they have authenticated with Google. The path will be appended with the authorization code for access. Must have a protocol. Cannot contain URL fragments or relative paths. Cannot be a public IP address.	
https:/// /auth/google_oauth2/callback	
https://www.example.com	
Create	

After creating the credentials, go to your Zammad installation and navigate to "Admin -> Security -> Third Party Applications" -> Google. Enter your Client ID and Client secret here.

🔵 Anmeldung über Google				
Aktivieren der Benutzeranmeldung über Google. Registriere Deine Anwendung zuerst über Google API Console Site.				
CLIENT ID				
apps.googleusercontent.com				
CLIENT SECRET				
	Übermitteln			

After submitting, the login via Google can be used.

# 28.3.5 Office 365

Zammads Office 365 allows your users with Microsoft accounts to login. This works for Azure users as well and can be an alternative to *LDAP / Active Directory*.

Note: This documentation part does not cover our Microsoft 365 email channel.

USERNAME / EMAIL  PASSWORD  Remember me  Sign in  OR SIGN IN USING  Office 365			
Remember me  Sign in  OR SIGN IN USING	USERNAME / EMAIL		
Remember me  Sign in  OR SIGN IN USING	1		
Sign in     Forgot password?       OR SIGN IN USING	PASSWORD		
Sign in     Forgot password?       OR SIGN IN USING			
OR SIGN IN USING	🗆 Remember me		
OR SIGN IN USING	Sign in		Forgot password?
Office 365		OK SIGN IN USING	
	Office 365		

# Limitations

Supported account types: Please note that Zammad only supports these account types (App dependent):

- Accounts in this organizational directory only (Default Directory only Single tenant)
- Accounts in any organizational directory (Any Azure AD directory Multitenant)
- Accounts in any organizational directory (Any Azure AD directory Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

Avatars of signing in users: Zammad currently ignores user avatars. If the user is registered with e.g. Gravatar, Zammad will fetch the avatar from there if enabled. See *Zammad Image Service* for more.

#### Step 1 - Register a Microsoft app for Zammad

Login to the Microsoft Azure Portal and navigate to App registrations to create a new app. Provide the requested information as follows and register your app.

Name: Any meaningful name fitting, this name will be displayed to users trying to authenticate with this app.

Supported account types: Choose one of the above mentioned account types (see Limitations).

**Tip:** The correct account type depends on your use case. If you want to use the authentication internal only, choose the first option. If you're unsure, use the "Help me choose..." link.

Redirect URI (optional): Select web and provide your callback url. The callback url looks like this: https:// zammad.domain.tld/auth/microsoft\_office365/callback

#### Within API permissions add the following permissions:

#### **OpenId permissions**

• openid

User

• User.Read

#### Contacts

• Contacts.Read

You can find these permissions within *Microsoft Graph*  $\rightarrow$  *Delegated permissions*.

Within **Certificates & secrets** create a new client secret. Note down the returned secret **value** for later. **Do not** use the secret ID!

From **Overview** copy your apps *Application (client) ID*. If you're using a single tenant app, please also copy *Directory (tenant) ID*. You now have all required information for Zammad.

#### Step 2 - Add app credentials to Zammad

Navigate to Security  $\rightarrow$  Third-party Applications (Tab) within Zammads admin settings. Scroll down to the section *Authentication via Office 365* and fill in the required information.

- App ID: This is your Application (client) ID.
- App secret: This is your *client secret* (value).
- **App Tenant ID: optional** only required for apps that use account type *Accounts in this organizational directory only* (*Default Directory only Single tenant*).

Apply your settings by pressing submit and activate Authentication via Office 365.

# 28.3.6 Twitter

It is possible to create a quick login for your helpdesk via Twitter To do so, you need to follow these steps:

#### **Register Twitter app**

Go to https://dev.twitter.com/apps and login with your account.

Application Management		<b>2</b> 7 -
Twitter Apps	You don't currently have any Twitter Apps.	
	y Tweet	
About Terms Privacy Cookies		© 2016 Twitter, Inc.

Click on "Create App"

😏 Application Management

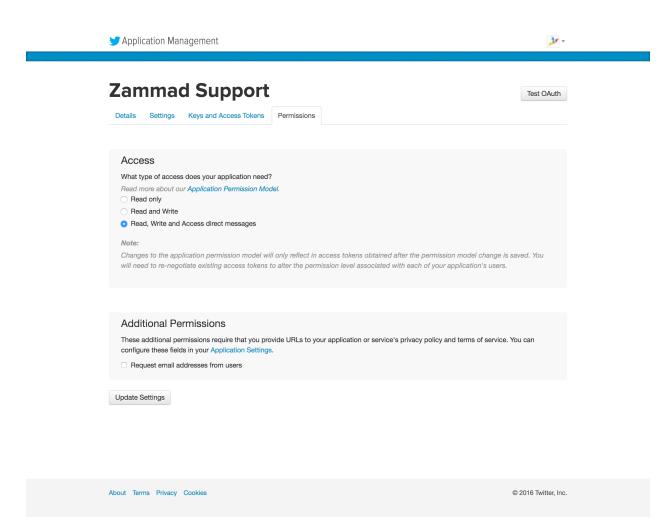
2--

# Create an application

Name *	
Zammad Support	
Your application name. This is used to attribute the source of a tweet and in user-fac	ing authorization screens. 32 characters max.
Description *	
Zammad App to access Tweets, Mentions and Direct Messages.	
Your application description, which will be shown in user-facing authorization screen	s. Between 10 and 200 characters max.
Website *	
https://zammad.com	
Your application's publicly accessible home page, where users can go to download, source attribution for tweets created by your application and will be shown in user-fit (If you don't have a URL yet, just put a placeholder here but remember to change it.	
Callback URL	
given here. To restrict your application from using calibacks, leave this field blank.	should explicitly specify their oauth_callback URL on the request token step, regardless of the value
Developer Agreement Yes, I have read and agree to the Twitter Developer Agreement.	
Create your Twitter application	

Enter app settings. As "Callback URL" you need to enter "https://zammad\_host/api/v1/external\_credentials/twitter/ callback"

After the app has been created, update the application icon and organization attributes.



Next we need to set read, write and access direct messages permissions for the app.

	/lanagement	25 -
Zamma	ad Support	Test OAuth
Details Settings		
Application Se Keep the "Consumer Consumer Key (API K Consumer Secret (AP	r Secret" a secret. This key should never be human-readable in your application.           Key)         XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
Access Level	Read, write, and direct messages (modify app permissions)	
Owner	zammadhq	
Application	Actions	
	onsumer Key and Secret Change App Permissions	
Regenerate Col		
Your Access To You haven't authorized	ed this application for your own account yet. ess token here, you will have everything you need to make API calls right away. The access token a	generated will be assigned your
Your Access Te You haven't authorized By creating your acce	ad this application for your own account yet. ess token here, you will have everything you need to make API calls right away. The access token of permission level.	generated will be assigned your
Your Access To You haven't authorized By creating your acce application's current p Token Actio	ad this application for your own account yet. ess token here, you will have everything you need to make API calls right away. The access token of permission level.	generated will be assigned your

Go to "Keys and Access Token" tab and note the "Consumer Key" and "Consumer Secret".

#### **Configure Zammad as Twitter app**

Go to "Admin -> Security -> Twitter -> Third Party Applications -> Twitter Section"

# Anmeldung über Twitter Aktivieren der Benutzeranmeldung über Twitter. Registriere Deine Anwendung zuerst über Twitter Developer Site. TWITTER KEY TWITTER SECRET Übermitteln

Fill in the "Twitter Key" and the "Twitter Secret" and click the "Submit" button.

Now you can link accounts via "Avatar -> Profile -> Link Accounts" or login via Zammad login page.

# 28.3.7 SAML

Connect your SAML identity provider as a single sign-on (SSO) method.

#### Note: What is SAML?

SAML is an open standard for SSO authentication (among other things). Sign-ins are shared across multiple **service providers** and managed by a central **identity provider** (IdP).

In this case, the service provider is Zammad, and the IdP is a software service that you either host or subscribe to (*e.g.*, Keycloak, Redhat SSO Server, ADFS, or Okta).

This guide assumes you are already using SAML within your organization (i.e., that your IdP is fully set up).

#### Step 1: Configure Your IdP

#### Add Zammad as a client/app

Import Zammad into your IdP using the XML configuration found at https://your.zammad.domain/auth/ saml/metadata.

#### Note: What if my IdP doesn't support XML import?

You will have to configure Zammad as a new client/app manually using the above XML metadata file for reference. For instance, when you see this tag:

Set the Assertion Consumer Service Binding URL (sometimes also listed as Valid Redirect URIs) to http://your.zammad.domain/auth/saml/callback.

## Set up user attribute mapping

Zammad requests the following user attributes (or "properties") from the IdP:

- Email address (email)
- Full name (name)
- Given name (first\_name)
- Family name (last\_name)

You may need to set up "mappers" (or "mappings") to tell your IdP how user attributes in SAML correspond to those in Zammad. For a more detailed breakdown, refer to the XML metadata file referenced in the previous section.

#### **Per-IdP Instructions**

#### Keycloak

- To add Zammad as a client, save the XML configuration to disk (https://your.zammad. domain/auth/saml/metadata) and use Clients > Create > Import in the Keycloak admin panel.
- To help Zammad match its own user accounts to Keycloak users, create a user attribute (or "property") mapper:

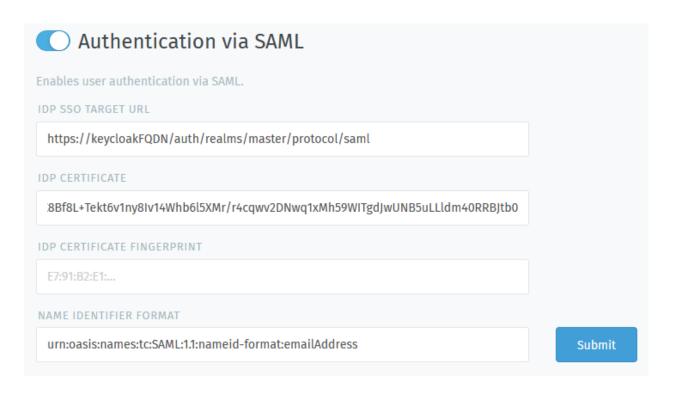
Clients > https://your.zammad.domain/auth/saml/metadata > Mappers > Create		
Name	EmailAddress-Email	
Mapper Type	User Property	
Property	emailAddress	
SAML Attribute Name	email	
SAML Attribute NameFormat	basic	

In the example above, we're telling Zammad that whenever it receives a SAML login request, it should take the emailAddress property from Keycloak, look for a Zammad user with the same email attribute, and create a new session for that user.

If your Keycloak users' email addresses are stored on another property (*e.g.*, username), adjust accordingly.

#### Step 2: Configure Zammad

Enable SAML and enter your IdP's details in the Admin Panel under Settings > Security > Third Party Applications > Authentication via SAML:



#### Note: For the IdP certificate / certificate fingerprint:

Provide **only one or the other**—do not provide both! (Between the two, we recommend the signing certificate itself: fingerprints use SHA-1, which has been broken for a while now.)

**Keycloak users:** Find your certificate in the Keycloak admin panel under **Realm Settings > Keys > RSA > Certificate**.

See automatic account linking for details on how to link existing Zammad accounts to IdP accounts.

#### Troubleshooting

Automatic account linking doesn't work Have you double-checked your IdP's user attribute mapping configuration?

Note: We're currently missing documentation for the following login providers:

- LinkedIn
- Weibo

# 28.3.8 Automatic account link on initial logon

In general there's two possible options for Zammad on how to deal with already known users as they try to authenticate against a third-party application. By default, Zammad will not automatically link "unknown" authentication providers to existing accounts.

This means that the user has to manually link authentication providers to their accounts (for more about this consult the user documentation).

Sometimes this doesn't come in handy as this also means you'll receive error messages about "email address being in use already" for (yet) unknown third-party authentication methods.

If you want to allow your users to always be able to log in, no matter what, you may want to enable Automatic account link on initial logon.

۹ 💦	Organizations	Security
	Overviews	
Ø Dashboard	Text modules	Base Password Third-party Applications
Cverviews	Macros	Automatic account link on initial logon
📕 Knowledge Base	Tags	Enables the automatic linking of an existing account on initial login via a third party application. If this is
Customer Chat	Calendars	disabled, an existing user must first log into Zammad and then link his "Third Party" account to his Zammad account via Profile -> Linked Accounts.
	SLAs	Colority
Phone 2	Trigger	no v Submit
• Thanks! Great service!	A 1 1 1	

# CHAPTER 29

# Ticket

Note: Additional settings for the ticket composer interface can be found in the Composer Settings.

# 29.1 Base

Ticket Hook (default: Ticket#) The identifier for a ticket; e.g., Ticket#, Call#, MyTicket#.

Ticket Hook Position (default: right) With this setting you can decide (if) where to insert the ticket number.

*Right* This setting will add the ticket reference on the right site of the subject.

Example: Some Subject [Ticket#12345]

Left This setting will add the ticket reference on the left site of the subject.

Example: [Ticket#12345] Some Subject

None This will completely remove ticket references from the subject.

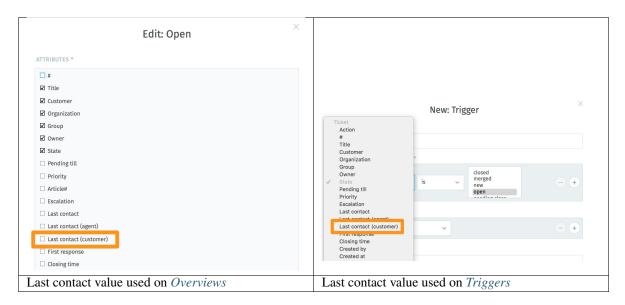
**Warning:** Please ensure to take a look at *Settings* within the email channel to ensure you have at least one reference that helps Zammad to assign follow-ups correctly.

Disabling this and not setting up any further follow up search will lead to unexpected results!

- Ticket Last Contact Behaviour (default: Last customer contact (with consideration an agent has replied This setting changes the way Zammad updates the Last Contact value of a ticket. This is fairly important for overviews and what you expect upon ticket updates of a customer.
  - Last customer contact (with consideration an agent has replied to it) If this option is chosen, Zammad will update the last updated value just once if a customer replies. After that, Zammad will wait for an agent to react.

This comes in handy if you want to work tickets in the order of their first update. This will not change ticket orders if customers decide to "bumb" the ticket affected.

Last customer contact (without consideration an agent has replied to it) When setting this option, Zammad will always update the last updated value. This means that if ordering by Last Update, ticket orders will change if customers "bump" the ticket.



# 29.2 Number

- **Ticket Number Format (default: Increment (SystemID.Counter)**) This setting defines the way Zammads ticket number will look. Changing this setting in production will cause follow up detection to fail.
  - **Increment (SystemID.Counter)** The increment value contains the SystemID (automatically generated during installation) and a increment which counts up with every new Ticket. The increment will automatically get another digit if needed.

Examples: 1010138, 1010139

**Date (Year.Month.Day.SystemID.Counter)** This version of the ticket number is fairly long. However, because it contains the date of ticket creation, it also allows you to see when the ticket has been created. You may feel familiar with this number format if you've worked with OTRS already.

Examples: 201206231010138, 201206231010139

- **OPTIONS** The below options allow you to further customize your ticket number. The availability of options differ depending of the chosen ticket number format above.
  - **Checksum (default: no)** If set to yes, we'll built a checksum to further "unique" the ticket number of your system. If you're dealing with many other ticket systems this might help to prevent false positive follow up detections on tickets.

This will also add another digit to the ticket number.

Min. size of Number (default: 5) This setting defines the minimum length of your ticket number. If your counter is not yet high enough, Zammad will fill the number with zeros to ensure the wanted length.

Please note that the minimum length is 3 (SystemID + at least one digit if below 10). Also, if the length is no longer long enough, the number will automatically get one digit longer. Ticket-Numbers **do not overflow**, thus it's save to keep it at 5 or set it lower if wanted.

Note: This option is only available if ticket number format is set to Increment!

# 29.3 Auto-Assignment

In a larger Zammad environment, it happens that several agents open the same ticket at the same time. Although collision detection is then effective, the efficiency of processing can be increased by means of the automatic assignment of tickets when a ticket is opened.

**Note:** Auto Assignment only kicks in if the ticket has no owner yet. By default the agent can always reset the ticket owner to – if needed.

The automatic assignment of tickets can be activated and configured in the admin area under within Settings -> Ticket -> Auto assignment.

If you want to use this function for only specific tickets, you can configure the conditions accordingly to meet your requiremment. By default the condition affects all tickets with the state open.

If you need to exclude users (e.g. a group leader), you can search and select the desired agents in the Exception Users list.

**Note:** The search function in this area is only affective, if you have too many agents to display at once to help you with the configuration.

# CHAPTER 30

# Integrations

Zammad offers numerous integrations that add rich features to your instance.

Note: We're still working on this part of our documentation, stay tight!

# 30.1 Integrations for phone systems

## 30.1.1 CTI (generic)

Zammad offers phone functionality for users with access to a CTI (computer telephony integration) system (available since version 2.6).

Using the CTI integration enables you to greet customers by name, get their tickets up on the screen with a single click. Or, identify missed calls at a glance, and return calls right from within Zammad. Manufacturers of telephone systems or developers can use this interface to connect their telephone system to Zammad.

## What do I need to get started?

Zammad requires the following information to support the agent:

- individual call events (e.g., call incoming/answered/ended)
- caller ID data

To use the new CTI interface, your CTI system must transmit this information (and only this information) to Zammad via HTTP.

## What can it do for me?

\*Inbound calls\* - Caller ID display: Open a caller's customer profile with just one click - Intelligent caller ID search: Automatically scans tickets for caller ID data (e.g., in email signatures) if customer account data is missing - Caller overview: See a caller's entire ticket history, or instantly create a new ticket - Call journal: See all calls at a glance, along with their status (e.g., which ones require a call back?) - Agent overview: See who's currently on a call - Selective call blocking<sup>1</sup> - Do-not-disturb mode<sup>1</sup>

### \*Outbound calls\*

- Direct dialing: Initiate calls from within Zammad<sup>1</sup>
- Dynamic caller ID: Set your caller ID based on, e.g., the destination country of the call\*

۹ 🏄	Call	er log				
Ø Dashboard		FROM	то	STATUS	DURATION	TIME
Cverviews		Nicole Braun (Zammad Foundation) +49 30 609854180	Christopher Miller +49 30 609811111	• ringing		22 minutes ago
Customer Chat		Ryan Parker (Good Customer Inc.) +49 30 609854180	Emma Taylor +49 30 609811111			24 minutes ago
• Thanks! Great service!	V	Samuel Lee +49 30 609854180	Samuel Lee (Awesome Customer Inc.)			24 minutes ago
<ul> <li>complaint wrong delivery of ord</li> <li>Order 887956</li> </ul>	$\square$	Emily Adams (Awesome Customer Inc. +49 30 609854180	Awesome Customer Inc.	ed		27 minutes ago
Awesome Customer Inc.	V	David Bell +49 30 609854180	EMAIL samuel@example.com PHONE			1 hour 22 minutes ago
🛓 Anna Lopez	V	Samuel Lee (Awesome Customer Inc.) +49 30 609854180	855-666-7777 ADDRESS			2 hours 22 minutes ago
<ul><li>Emily Adams</li><li>Order 787556</li></ul>	V	maybe Emily Adams (Awesome Custo +49 30 609854180	5201 Blue Lagoon Drive 8th Floor & 9th Floor Miami, FL 33126			5 hours 22 minutes ago
			NOTE Likes americano, did order two units			
🤹 н. 🗢 +						

<sup>1</sup> requires PBX/telephone system support

• • •						
۹ 🏄	Email	💽 CTI (gen	eric)			
Dashboard	Chat	This service shows yo	u contacts of incoming calls and	a caller list in re	ealtime.	
:= Overviews	Twitter	Also caller id of outbo	ound calls can be changed.			
Customer Chat	Facebook	Settings				
Phone 1	Telegram	-	the Zammad endpoints in the PE	3X:		
• Thanks! Great service!	Settings	TYPE Endpoint	URL http://zammad.example.com/	ani/v1/cti/nc4(	C-mvn874TevvrFS7rivYaNil	
• complaint wrong delivery of ord	Branding		nttp.//zannad.example.com/	api/ vi/cu/ pc+c		
O Order 887956	System	Inbound				
Awesome Customer Inc.	Security	Blocked caller ids bas	ed on sender caller id.			
👤 Anna Lopez	Ticket	CALLER ID TO BLOCK		NOTE		ACTION
👤 Emily Adams	System	4930609854189		my onw note	e	+ Add
O Order 787556	Integrations	Outbound				
	API		und calls based on destination ca	ller id.		
	Objects	DESTINATION CALLER	ID SET OUTBOUND CALL	ER ID NO	OTE	ACTION
	Translations	49* or 323012345678	4930609854189	n	ny onw note	+ Add
🛞 il. 🌣 🕂	Maintenance					

More information can be found on our CTI API intro.

# 30.1.2 Placetel CTI

Starting with Zammad 2.8, we're supporting the CTI for placetel. For configuration, please go to Settings -> Integrations -> Placetel in the admin panel.

## Limitations

Please note, that it's not possible to log outbound calls. This is due to a limitation of the Placetel API.

## Getting needed information from placetel

Before starting with Zammad, you'll need to login to your placetel Account, go to Administration -> Settings. Here you'll find the tab "External APIs" (open it). Activate "Call Control/Notify API" and enter the URL of the Zammad API endpoint (can be found within the Placetel integration page). Further below you can tick the phone numbers you want Zammad to get notified on.

Your PBX	More settings	
All users	Logo Snom security External API API Title Routing and Notification Firewall	
Phone numbers Groups	Call Control / Notify API	
IP device	Enable Call Control / Notify API	
Routing plans	URL of your API endpoint	
Routing objects VoIP destinations	https:// /api/v1/placetel/0lbMusOcc7wcLyfC	
Personal	Shared Secret for HMAC	
announcements Placetel		
announcements	Recent responses of your API endpoint	
Settings	Show / Hide	
	External routing API	
<	Select all / nothing	

Now change to the API tab and grab your API token. If you don't have an API token yet, you can simply create one.

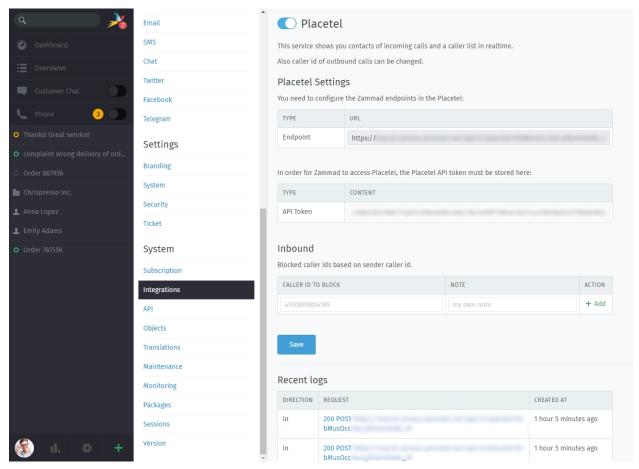
# More settings

Logo Sno	m security	External	API API	Title	Routing a	nd Notification	Firewall	
Read operatio	n Write	operation	API token					
Api key								
Create a new	API token							

## Activating Placetel Integration within Zammad

Enabling the Zammad placetel integration is really easy. Simply paste your API token into the text field, activate the integration and save your changes. You're all set up! If needed, you can add Inbound caller IDs to a ignore list. If you do this, Zammad will not show any notifications from those numbers.

Further below on the same page you'll have a log of recent notifications that came to the API, in case you need to debug something.



As soon as you start calling (in and out) on activated numbers, you'll see them in your Caller log with their current state.

۹ 🏄	Cal	ler log				
Ø Dashboard		FROM	то	STATUS	WAITING DURATION	TIME
Overviews		Marcel Herrguth	0.00000000000	• not reached	00:03	1 hour 7 minutes ago
Customer Chat		Nicole Braun (Zammad Foundation) +49 30 60985-180	Christopher Miller +49 30 609811111	<ul> <li>ringing</li> </ul>		18 hours ago
• Thanks! Great service!		Ryan Parker (Good Customer Inc.) +49 30 609854180	Emma Taylor +49 30 609811111			18 hours ago
<ul> <li>complaint wrong delivery of ord</li> <li>Order 887956</li> </ul>	Ø	Samuel Lee +49 30 609854180	Samuel Lee (Awesome Customer Inc.) +49 30 609811111	• ringing		18 hours ago
Enrispresso Inc.	Ø	Emily Adams (Awesome Customer Inc.) +49 30 609854180	Jacob Smith +49 30 609811111	• connected		18 hours ago
🛓 Anna Lopez	Ø	David Bell +49 30 609854180	Jacob Smith +49 30 609811111			19 hours ago
<ul> <li>Emily Adams</li> <li>Order 787556</li> </ul>		Samuel Lee (Awesome Customer Inc.) +49 30 609854180	+49 30 609811111			20 hours ago
		maybe Emily Adams (Awesome Customer Inc.) +49 30 609854180	Christopher Miller +49 30 609811111			23 hours ago

# 30.1.3 Sipgate

**Note:** In order to use this feature, please go to the Feature Store in your siggate account and activate siggate.io. This feature is available for all account types of siggate, the store option might differ in name and API calls.

Knowing who's calling is quite important, if you want to bring your support to the next level! Our integration for sipgate enables you to see whos calling who. If you have a customer that wants to get connected to Emmily, you can even check if she's free in the caller log.

For configuration, please go to Settings -> Integrations -> sipgate in the admin panel.

Get your incoming and outgoing URL of your Zammad instance:

```
Incoming: https://zammad.your.tld/api/v1/sipgate/in
Outgoing: https://zammad.your.tld/api/v1/sipgate/out
```

You now need to visit the Console website from sipgate. Go to Webhooks -> URLs and enter your incoming and outgoing URLs there. Further below you can also choose what extensions or groups should appear in your Zammad instance later.

💲 sipgate basic		sipgate basic Account-No
Clients	WEBHOOKS	URLS
	() URLs	Incoming https:// /api/vi/sipgate/in (
	Debug Log	Outgoing https:// 'api/vi/sipgate/out (
		TOBOLE DEBUD LOG
		SOURCES
		Use for all phonelines and groups
		Q. Search for phonelines and groups
		VolP-Telefon von Marcel Herrguth         Phoneline           Marcel Herrguth         Phoneline
		Search for phonelines and groups      VolP-Telefon von Marcel Herguth

Now you're all set to activate the sipgate integration within Zammad. If you want to, you can inbound and outbound caller IDs to block. This ensures that you can concentrate on your work instead of answering unwanted calls all the time. Setting the default Caller ID is optional and makes sense if you have several numbers. This ensures that your group number for e.g. support is always displayed so your agent don't get called back directly.

a 💦	Channels ^	C sipgate.i	io					
Dashboard	Web	This service shows yo	ou contacts of i	incoming calls and a	a caller list	in realtime.		
	Form	Also caller id of outbo	ound calls can	be changed.				
Cverviews	Email	sipgate.io Setti	ings					
Customer Chat	SMS	You need to configure	/ou need to configure the Zammad endpoints in the Sipgate web interface:					
📞 Phone 3 🌑	Chat	TYPE	URL					
• Thanks! Great service!	Twitter	Inbound	https://		/api/	v1/sipgate/in		
• complaint wrong delivery of ord	Facebook	Outbound	https://		/api/	v1/sipgate/out		
Order 887956	Telegram							
🖿 Chrispresso Inc.	Settings	Inbound						
👤 Anna Lopez	Branding	CALLER ID TO BLOCK	Blocked caller ids based on sender caller id. CALLER ID TO BLOCK NOTE ACTION					
⊥ Emily Adams	System				NOTE		+ Add	
O Order 787556	Security	4930509854189			my own		<b>T</b> A00	
	Ticket	Outbound						
	System	Set caller id of outbou	und calls base	d on destination cal	ller id.			
	Subscription	DESTINATION CALLER	t ID S	SET OUTBOUND CALLE	RID	NOTE	ACTION	
	Integrations	49* or 323012345678	89	4930609854189		my own note	+ Add	
	API							
	Objects	Default caller id.						
	Translations	DEFAULT CALLER ID			NOTE			
	Maintenance	4930509854189			Default o	aller id for outbound calls.		
	Monitoring	_						
🛞 il. 🗢 🕂	Packages 🗸	Save						

You can now switch to your caller log. You'll see missed, in- and outgoing calls here. Pretty easy, right?

Deshboard         FROM         TO         STATUS         WAITING         DURATION         TIME           Overviews	ЛЕ
E Overviews Marcel Herrouth Marcel Herrouth	
₩ <sub>+0</sub> / +49.30 • connected 00.002 just	st now
Customer Chat         Out         Marcel Herrguth         Marcel Herrguth         00.04         00.17         2 million           V         Phone         3         •••	ninutes ago
Marcel Herrstuth Marcel Herrstuth	minutes ago
O complaint wrong delivery of ord         Marcel Herrguth         Marcel Herrguth         00:12         01:02         11 m           0 Order 85736	minutes ago
Marcal Horrarth	/07/2018
+49 30 609854180 +49 30 60981111	/06/2018
Lenity Adams         Ryan Parker (600d Customer Inc.)         Emma Taylor         11/0           0 Order 787556         +49 30 60951180         +49 30 60951111         11/0	/06/2018
Samuel Lee Samuel Lee (Awesome Customer Inc.) +49 30 60985+180 +49 30 60981111	/06/2018
Emily Adams (Aversome Customer Inc.) Jacob Smith +49 30 609851180 +49 30 60981111	/06/2018
David Bell         Jacob Smith         11/0           +49.30 60985x180         +49.30 60981111         11/0	/06/2018
Samuel Lee (Awesome Customer Inc.)         +49 30 60951111         11/0           +49 30 60955180         11/0         11/0	/06/2018
I.         O         +         maybe Emily Adams (Awesome Customer Inc.)         Christopher Allier 4-0 30 600851100         T1/0	/06/2018

## **Debug Log**

In case something doesn't work as expected or you're just curious, Zammad also offers a log of the last API calls on the integration page. If you click on the request, a detailed view will open showing you the exact request.

Recent lo	gs		
DIRECTION	REQUEST		CREATED AT
in	200 POST https://	/api/v1/sipgate/in	just now
in	200 POST https://	api/v1/sipgate/in	1 minute ago
in	200 POST https://	/api/v1/sipgate/in	1 minute ago
in	200 POST https:// t	api/v1/sipgate/ou	8 minutes ago
in	200 POST https:/ t	/api/v1/sipgate/ou	8 minutes ago
in	200 POST https://	/api/v1/sipgate/in	8 minutes ago
in	200 POST https://	/api/v1/sipgate/in	9 minutes ago
in	200 POST https://	/api/v1/sipgate/in	10 minutes ago

# 30.2 Integrations for authentication and customers

## 30.2.1 Clearbit

With our Clearbit integration, you can easily enrich the information provided by Zammad. If the customers or agents email address is known to Clearbit, it will share all information it has regarding the user with Zammad. Those information can include the following:

- Avatar
- Address information
- Website information
- A BIO (as Note by default)

If needed, you can add further custom objects and add mappings to them, so the clearbit information can be filled within the database. In general you can get any information from clearbit, as long as you have a mapping to an Zammad object.

**Hint:** Clearbit does have a Mapping of fields like LDAP and Exchange have, but does not "win" against Zammad information. This means that if you have e.g. the lastname field filled in already and Clearbit has other information on that, it will not be updated.

However: If let's say the lastname has been set by Clearbit and Zammad notices that the lastname on the Clearbit source has changed, Zammad will also update this value.

## Configuration

The configuration of clearbit is really easy and done fast! Just login to your Clearbit-Account, go to "API" and copy the secret-API-Key.

<b>e</b>		🖉 API	Logs	E Docs
×				
ာင်္နီ Get Started		`	Your API Key	
Usage		e <i>cret API key</i> . Keep it sa anged or revoked, plea	afe—it's your key to the ca	stle. If you need to get
ညြှ Demo	an Ar rice y en	anged of revolved, prec	<u>condectus</u> .	
Batch				
⊂J́⊃ Forms			this key for the Reveal Go use your secret key above	
🖉 API				
My Profile				
? Support				
→ Logout			API Settings	

Now change to your Zammad instance, go to Integrations (System) -> Clearbit in the admin panel. Paste your API-Key into the API-Key-Field and decide if Zammad should create unknown Organizations automatically, if the user does not have one yet (and Clearbit knows it). The shared option decides if the new organizations Zammad creates with Clearbit should be shared ones.

Note: If you're unsure what option to choose, better stick with "no". You can also learn more about Organizations.

۹ 🏄	Email	Clear	rbit	
🖉 Dashboard	SMS	Automatically e	nrich your customers and organizations with fresh, up-t	o-date intel. Map data directly to objec
Overviews	Chat	TITLE	VALUE	DESCRIPTION
Customer Chat	Twitter	API Key		Your api key.
	Facebook			
C Phone 2	Telegram	Auto create	yes 🗸	Create organizations automatically if record has one.
• Thanks! Great service!				
• complaint wrong delivery of ord	Settings	Shared	no 🗸	New organizations are shared.
O Order 887956	Branding			

The Mapping option works similar to the mapping within the Exchange and LDAP sync. You can add further mappings for e.g. custom fields if you need more information that Clearbit can provide.

**Note:** If you want to add more Clearbit fields and want to learn more about available fields on their API, you can take a look at their API documentation .

If you're happy with the above chosen Settings and your mapping, just save the changes and enable Clearbit integration. Zammad will now start polling the Clearbit API as users contact you.

Note: Zammad does not synchronize with Clearbit on a regular basis, but on demand if needed. This saves API calls.

۹ 🏄	Email			
Ø Dashboard	SMS	Mapping		
: Overviews	Chat	What values of Clearbit should be synced to use	ers.	
Customer Chat	Twitter	CLEARBIT	ZAMMAD	ACTION
	Facebook	person.name.givenName	user.firstname	👕 Remove
C Phone 2	Telegram	person.name.familyName	user.lastname	👕 Remove
• Thanks! Great service!	Settings	person.email	user.email	👕 Remove
<ul> <li>complaint wrong delivery of ord</li> <li>Order 887956</li> </ul>	Branding	person.bio	user.note	👕 Remove
Order 88/956     Enrispresso Inc.	System	company.url	user.web	👕 Remove
Emma Taylor	Security	person.site	user.web	👕 Remove
Samuel Lee	Ticket	company.location	user.address	👕 Remove
<ul> <li>Order 787556</li> </ul>	System	person.location	user.address	👕 Remove
	Subscription	person.attribute	user.attribute	+ Add
	Integrations			
	API	What values of Clearbit should be synced to org	ganization.	
	Objects	CLEARBIT	ZAMMAD	ACTION
	Translations	company.legalName	organization.name	👕 Remove
	Maintenance	company.name	organization.name	👕 Remove
	Monitoring	company.description	organization.note	👕 Remove
	Packages	company.attribute	organization.attribute	+ Add
	Sessions			
🚯 il. 🔅 🕂	Version	Save		
🧶 III 🔅 🕂	*			

Below the Settings and Mappings, you'll find our Integration log. You can see what requests Zammad sent to Clearbit and also the APIs Response.

System	Save Recent logs			
Subscription		-		
API	DIRECTION	200 GET clearbit ->	CREATED AT	
🛞 il. 🔿 + Objects				

By the way, you can also view the API log on the Clearbit website - the information seen is basically the same.

		200	02:57 pm — 12/06/2
	Search by p	General	
GET /v2/combined/find		Host	person.clearbit.io
GET /v2/companies/find		Path	/v2/combined/find
GET /VZ/Companies/Infu		API Version	2018-06-06
GET /v2/combined/find		Request IP	
GET /v2/combined/find		Request headers	
GET /v2/combined/find		Host	person.clearbit.io
		Accept	*/*
GET /v2/combined/find		Version	HTTP/1.1
GET /v2/combined/find		User-Agent	Ruby
		Authorization	
GET /v2/combined/find		Accept-Encoding	gzip;q=1.0,deflate;q=0.6,identity;q=0.3
GET /v2/combined/find		Request params	
GET /v2/combined/find		email	
GET /v2/combined/find		Response header	rs
GET /v2/combined/find		Content-Type	application/json
GET /V2/combined/lind	12.45 pm –	Content-Length	2107
GET /v2/combined/find		Response body	
GET /v2/combined/find		{ "person": {	
GET /v2/combined/find		"id": "name": {	"HeConnection"
GET /v2/combined/find		"fullName": "givenName" "familyName	"MrGeneration", : "MrGeneration",

#### Example when adding a user

To show you how fast information is added, we added a small Screencast below. This shows the creation of the User Alex from Clearbit. As we already set the lastname of Alex to "X", Zammad did not update it. What Zammad did was to add further information it received from Clearbit. Really cool, right?

## 30.2.2 S/MIME

#### **Prerequisites**

• A certificate and private key for your own organization

(Use this to sign outgoing messages and decrypt incoming messages.)

• Certificates belonging your contacts, or their issuing certificate authority (CA)

(Use these to verify incoming message signatures and encrypt outgoing messages.)

#### Note: I'm new to S/MIME. Where can I get a certificate?

The easiest way to get certificates is to buy an annual subscription through a commercial CA, such as:

- Sectigo (formerly Comodo)
- Secorio
- GlobalSign

(Zammad is not affiliated with these CAs in any way.)

You can also generate your own self-signed certificates, but the process is complicated and usually **involves extra** work for your contacts.

Bear in mind that S/MIME only works if the other party is using it, too.

## Limitations

Please note that Zammad will distrust senders by default. This means that you're always required to provide certificate data, no matter if for signing or encrypting.

This is by design and can't be adjusted.

#### Manage Certificates

S/MIME is **disabled by default**. Enable it to start adding certificates.

Fig. 1: Manage certificates in the Admin Panel under **System > Integrations > S/MIME**. Certificates may be pasted in as plain text or uploaded from a file.

## Add Certificate data

Add Certificate Import public-key certificates for both your own organization and your contacts.

You can also add a bunch of certificates in one go by providing a single file with all relevant certificates.

#### Warning: ALWAYS verify certificates in-person or over the phone!

The whole point of signatures is to alert you when someone is trying to pretend to be someone they're not. Never accept a certificate from someone online without verifying it first.

#### Note: What about trusted certificate authorities?

In some cases (*e.g.*, when dealing with large enterprises), you may be given a certificate for an entire CA, rather than a single contact. Add it here to trust *all* certificates issued by that CA.

Commercial CAs can usually be verified online. Zammad does not include a list of built-in, trusted CAs.

Add Private Key Once you've added a public-key certificate, you can import its matching private key.

Private keys are for **your own organization only**; never ask your contacts for their private keys.

#### Note: Certificates and private keys must be uploaded separately.

	S/MIME	
	S/MIME allows you to send digitally signed and encrypted messages	
	Certificates & Private Keys	
	SUBJECT	Н
1	/C=DE/ST=Berlin/L=Germany/O=LeCorp/OU=IT/CN=example@domain.tld/emailAddress=example @domain.tld	2
-	/C=DE/ST=Berlin/L=Germany/O=Zammad/OU=IT/CN= @@zammad.com/emailAddress= @zammad.com Including private key.	8

Fig. 2: A note is displayed on certificates with a matching private key (see line 2).

If your certificate and private key are bundled together in the same file or PEM block, import it twice (once using each button).

Please note that bulk imports of private keys are not possible.

## **Download Certificate data**

You can download the earlier provided certificates and private keys at any time from your Zammad instance.

#### Note: Passphrase-protected private keys stay protected

Downloading private keys that originally were encrypted with a passphrase will also have this state after retrieval. Knowing the password is mandatory to continue working with keys in question.

Fig. 3: Download stored certificates and their keys

## **Default Behavior**

The ticket composer will set all outgoing messages to **signed and encrypted** by default (assuming the required certificates exist).

These defaults can be modified on a per-group basis:

Of course, agents can always manually change these settings on each email they send out.

## Troubleshooting

All of the system's latest S/MIME activity is displayed in the Recent Logs section.

## **Default Behavior**

Choose the default behavior of the S/MIME integration on per group basis. If signing or encrypting is not possible, the setting has no effect. Agents call always manually alter the behavior for each article.

Sales yes v no v	Salar
yes V	Service Deck
	Service Desk no 🗸 yes 🗸
Service Desk no 🗸 yes 🗸	

Fig. 4: Logs report the status and details of all mail, both incoming and outgoing, that used signing/verification or encryption/decryption.

Note: This log does not include email sent by triggers or the scheduler. For those, check your production.log.

## **Common Issues**

I received a signed/encrypted email before I set up S/MIME integration No problem. Once S/MIME has been enabled and the appropriate certificates have been added, agents will be prompted to retry verification/decryption on matching emails.

Encryption: Unable to find private ke	y to decrypt			
no visible content				MR
1 ATTACHED FILES				
🔒 set to internal	🦘 reply	→ forward	🔥 split	

#### The Encrypt button is disabled

- Have you added the recipient's certificate?
- Are you sure the recipient's certificate is valid?
- Have you checked your production.log for more details?

Warning: If encryption doesn't work in the composer, it won't work in triggers or the scheduler either!

#### The Sign button is disabled

- Have you added both the certificate and private key for your organization?
- Does the email address on the certificate match the email address of the agent/group composing the email?

### Error: "Fingerprint already taken"

• Are you sure you haven't added this certificate already?

#### Error: "invalid byte sequence in UTF-8"

- Please ensure to provide PEM formatted certificate and keys.
- Did you check if the provided file is a valid certificate or key?

S/MIME is the most widely-supported method for secure email communication. With S/MIME, you can exchange **signed** and **encrypted** messages with others.

Signing is proof that a message hasn't been tampered with or sent by an impersonator.

In other words, it guarantees a message's **integrity** and **authenticity**.

Encryption scrambles a message so that it can only be unscrambled by the intended recipient.

In other words, it guarantees privacy and data security.

Fig. 5: Once S/MIME has been enabled, Encrypt and Sign buttons will appear in the ticket composer.

**Prerequisites** New to S/MIME? This section helps you to find certificate providers and points out Limitations.

Manage Certificates Add and download certificates; configure group default behaviors.

Troubleshooting Took a wrong turn? About recent logs and common issues.

## Usage

For more details on how S/MIME integration works in practice, see the user docs.

# **30.3 Integrations for Monitoring Systems**

Note: This section currently misses the following integrations:

- Icinga
- Monit
- Nagios

# 30.3.1 Checkmk

Checkmk is a powerful IT monitoring tool that can send real-time status alerts to Zammad via email or REST API. Set these alerts up in Checkmk, and Zammad will automatically create, update, and close tickets based on the health of your system:

	chrispresso	o is CRITICAL d 1 hour 12 minutes ago		*	*
EventID: 142857 Host: chrispresso Service: postfix State: CRITICAL Text: CRIT - Status: the Post RemoteIP: 127.0.0.1	fix mail system is not	running		1	Ę
UserAgent: curl/7.68.0	🔨 reply	→ forward	♪ split		÷
	5 minu	ites ago	** spuc		
Can someone look into this	?				
Set to public		split ites ago	👕 delete		
EventID: 0 Host: chrispresso Service: postfix State: OK Text: OK - Status: the Postfi RemoteIP: 127.0.0.1 UserAgent: curl/7.68.0	x mail system is runniı	ng, PID: 45890		- Ar	
set to internal	🔦 reply	→ forward	🔥 split		

Fig. 6: Multiple alerts, same ticket.

## Setup Guide

Whenever the Checkmk integration is enabled, Zammad listens for messages on its API and over email. As long as those messages follow the required format, Zammad will create new tickets (or find and update existing ones) based on the message contents.

That means that "setting up Checkmk integration" is simply a matter of **adding configuration to your Checkmk site**: telling it when to send these messages and what to say. To do that, you'll need to create a new **notification rule** (see Checkmk's official docs for help with that).

As part of this new rule, you'll have to choose a **notification method** (*i.e.*, a script to execute whenever the rule is triggered). This script will be written by you (samples below), and contain the logic for sending API/email messages to Zammad:

🕜 check <b>mk</b>	Raw 1.6.0p11	Create new notification rule	cmkadmin (admin) 13:55 📖 🧯	Ì
Host- and Service events Host- and Service notifications Search Global Logfile 	· EDIT	<ul> <li>O All Rules</li> <li>▼ RULE PROPERTIES</li> </ul>		
BOOKMARKS ··· ADD BOOKMARK ···	-× • EDIT	Description		0
WATO - CONFIGURATION  Main Menu Monitoring Agents Hosts Global Settings Host Service Parameters	- ×	Documentation URL Rule activation Overriding by users	│ do not apply this rule ▼ allow users to deactivate this notification	
Manual Checks     Check Plugins     Check Plugins     Host & Service Groups     Users     Roles & Permissions     Contact Groups     Ontifications     Time Periods     Fund Console		NOTIFICATION METHOD Notification Method Notification Bulking	Zammad-host Zammad zammad-host Zammad-service	
Business Intelligence       Distributed Monitoring       Backup       Passwords       Analyze configuration       Background jobs       Logfile Pattern Analyzer       Custom Icons		▼ CONTACT SELECTION All contacts of the notified object All users All users with an email address	Notify all contacts of the notified host or service. Notify all users Notify all users that have configured an email address in their profile	
	□ × 29 GMBH	The following users		*

Fig. 7: Find your custom scripts in the Checkmk WATO under Notifications > New Rule > Notification Method.

Once you're done setting up your new rule, you're all set! New tickets should start coming in and auto-updating any time your rule is triggered.

(If you need help troubleshooting, be sure to check the Recent Logs.)

#### **API Alerts**

To add these scripts in the Checkmk WATO, copy them into your Checkmk installation directory and make them executable. (Be sure to replace the zammad.example.com callback URL with the one found in your admin panel.)

Service notification For updates on the status of the software running on your server (e.g., postgres).

```
#!/bin/bash
# /opt/omd/sites/<SITE>/local/share/check_mk/notifications/zammad-service
curl -X POST \
    -F "event_id=$NOTIFY_SERVICEPROBLEMID" \
    -F "host=$NOTIFY_HOSTNAME" \
    -F "service=$NOTIFY_SERVICEDESC" \
    -F "state=$NOTIFY_SERVICEDESC" \
    -F "text=$NOTIFY_SERVICEOUTPUT" \
    https://zammad.example.com/api/v1/... # see Admin Panel > System > Integrations_
    -> Checkmk > Usage
```

Host notification For updates on the status of the server itself.

#### Note: What's with all the env vars?

Whenever Checkmk runs these scripts, it needs to provide some information about the event that triggered the notification. This information is passed in the form of these *\$NOTIFY\_\** environment variables.

You can specify additional parameters to pass to the script when you're setting up your notification rule, but the ones you see here are all provided by default.

## **Email Alerts**

**Warning:** There are known bugs in Zammad's processing of email from Checkmk. This section will be completed once they have been resolved. (Learn more at GitHub issues #2377 & #2180.)

In the meantime, we encourage you to set up API alerts instead.

#### **API Reference**

For most users, *the sample scripts from the Setup Guide* will do the job just fine. But if you want more fine-grained control—for instance, to create high- and low-priority tickets for different types of system events—then you'll have to customize the data those scripts send to Zammad.

## Example

This custom script will automatically set all tickets it creates to high priority and assign them to charlie@chrispresso.com.

```
#!/bin/bash
curl -X POST \
    -F "event_id=$NOTIFY_HOSTPROBLEMID" \
    -F "host=$NOTIFY_HOSTNAME" \
    -F "state=$NOTIFY_HOSTSTATE" \
    -F "text=$NOTIFY_HOSTOUTPUT" \
    -F "priority=3 high" \
    -F "owner=charlie@chrispresso.com" \
    https://zammad.example.com/api/v1/...
```

### How does it work?

There are two kinds of data you can pass to the API, both in the form of key-value pairs:

**Checkmk parameters** are required, and make up the **contents** of the resulting tickets/articles. They also determine whether an event creates a new ticket or updates/closes an existing one.

These are the only values used in the sample scripts. Use them as-is; technically, they can be customized, but it's hard to imagine a good reason for it.

**Ticket attributes** are optional, and can be used to **adjust settings** on newly created tickets (*e.g.*, set the owner, group, priority, or state).

If you want to customize your Checkmk alert script, do it with these. Simply add an extra "form" option for each one (-F "key=value") to your script's curl command line, as in the example above.

#### Hint: It's just an API endpoint!

When using Checkmk integration, messages need to be formatted in a certain way, but that *doesn't mean the messages actually have to come from Checkmk*.

If you use another monitoring tool that's not officially supported by Zammad, there's probably a way to make it work with your Checkmk callback URL.

#### **Checkmk Parameters**

When a notification is received, Zammad creates a new article containing the details of the event that triggered it:

EventID: 142857 Host: chrispresso Service: postfix State: CRITICAL Text: CRIT - Status: the Postfix r RemoteIP: 127.0.0.1 UserAgent: curl/7.68.0	nail system is not runnin	g	
🔒 set to internal	reply 4 minutes ago	➡ forward	🔥 split

These details come from the fields listed below, which correspond to parameters provided by Checkmk (\$NOTIFY\_\*).

#### Required fields are marked with an asterisk (\*).

event\_id\* A unique ID for the system event. (\$NOTIFY\_SERVICEPROBLEMID / \$NOTIFY\_HOSTPROBLEMID)

host\* The hostname of the system that the event originated from. (\$NOTIFY\_HOSTNAME)

Used to determine if a new event belongs to an existing ticket. Also used in the subject line of the resulting article ("<host> is <state>").

service The name of the service that the event originated from. (\$NOTIFY\_SERVICEDESC)

Used to determine if a new event belongs to an existing ticket.

Displayed as - when omitted.

- state\* The current state of the service or host in question. (\$NOTIFY\_SERVICESTATE / \$NOTIFY\_HOSTSTATE)
  Used to detect when a ticket should be auto-closed (*i.e.*, on OK/UP). Also used in the subject line of the resulting
  article ("<host> is <state>").
- text The output of the process that triggered the event. (\$NOTIFY\_SERVICEOUTPUT/\$NOTIFY\_HOSTOUTPUT) Displayed as – when omitted.

## **Ticket Attributes**

Ticket Object Manager			New Attribute
DISPLAY	NAME	ТҮРЕ	ACTION
	customer_id		
	title		
Туре	type	select	Î
	group_id		
	owner_id		
	state_id		
	pending_time		
	priority_id		
	tags		

Fig. 8: Find a complete list of ticket attributes in the Object Manager.

Ticket attributes are entirely optional, and can be used to customize the tickets that Checkmk creates. (Note that these attributes will be ignored if a new event belongs to an existing ticket.)

Why would you want to do this? Maybe you have only one IT guy, and all system monitoring issues should be automatically assigned to him. Or, maybe you're creating multiple notification rules so that database outages take higher priority than disk space warnings.

In most cases, you'll probably want to set one of the following:

- group
- owner
- state
- priority

but in practice, you can set almost any attribute, including custom ones you created through the Object Manager.

Note: The following attributes are not customizable:

- title
- id
- ticket number
- customer

- created\_by\_id
- updated\_by\_id

#### How do I know what values I can set?

#### Warning: Invalid values $\rightarrow$ unpredictable behavior

If you provide a value that Zammad doesn't understand (*e.g.*, -F "priority=high"), it's not always clear what will happen. In some cases, a ticket will be created with the default values instead—but in others, it may not be created at all!

So what values does Zammad understand, then? Well, it depends...

owner Use an email address or username:

-F "owner=it@chrispresso.com"

group & priority Refer to the dropdown menus in the ticket pane:

```
-F "group=Users"
-F "priority=3 high"
```

	Ticket ~	÷
	GROUP *	
	Users	~
	OWNER	
	-	~
	STATE *	
₽	closed	~
	PRIORITY *	
	2 normal	~
	1 low	
	2 normal	
	3 high	
	LINKS	

#### Note: Ticket state CANNOT be set this way!

Why? Because -F "state=..." is already used as a Checkmk parameter.

**Everything Else** To set any other attributes, it helps to know your way around the Rails console. Valid values are those that you can set with a string:

```
# valid
>> Ticket.first.update(note: "You're gonna need a bigger boat")
=> true
>> Ticket.first.note
=> "You're gonna need a bigger boat"
>> Ticket::State.find_by(name: "open").id
=> 2
>> Ticket.first.update(state_id: 2)
=> true
>> Ticket.first.state.name
=> "open"
# invalid
>> Ticket.first.update(preferences: "I'm a Checkmk ticket!")
=> true
>> Ticket.first.preferences
= \{ \}
```

These values can then be passed directly to the API:

```
-F "note=You're gonna need a bigger boat"
-F "state_id=2"
```

## **Admin Panel Reference**

## **Settings**



This service receives http requests or emails from Checkmk and creates tickets with host and service.

If the host and service has recovered, the ticket can be closed automatically.

TITLE	VALUE	DESCRIPTION
Group	Users ~	Defines the group of created tickets.
Auto close	yes 🗸 🗸	Defines if tickets should be closed if service is recovered.
Auto close state	closed ~	Defines the state of auto closed tickets.
Submit		

Group Which group should Checkmk tickets be assigned to as a default (*i.e.*, when none is specified)?

(Applies to API alerts only.)

Auto close Should Zammad automatically close tickets if a service has recovered on its own?

(Agents will receive notifications for such closures as appropriate.)

Auto close state What ticket state should be applied when "auto-closing" a ticket?

(You may choose from the seven built-in ticket states, but if you change this setting from the default, you'll more likely want to define a new ticket state for this purpose. This can be especially useful for tracking tickets with *reports*.)

## **Recent Logs**

# Recent logs

DIRECTION	REQUEST	CREATED AT
in	200 POST https://verification- 20200807.zammad.com/api/v1/integration/check_mk/030e48 16bec37e5909cca98d6c1beb7c	50 minutes ago
in	200 POST https://verification-	50 minutes ago

If you're having trouble getting Zammad and Checkmk to play nicely together, this section can help you troubleshoot.

It contains a record of the fifty most recent transactions that Zammad knows about, including each one's request/response details and return status.

## 30.3.2 Zabbix Integration

This guide describes how to integrate your Zabbix 5.0 installation with Zammad using the Zabbix webhook feature. This guide will provide instructions on setting up a media type, a user and an action in Zabbix.

## **Requirements**

- Zammad with enabled HTTP Token Authentication
- Zabbix version 5.0 or higher

#### Setting up a Zammad

1. Enable API Token Access in Settings > System > API.

2. Create a **new user** for a Zabbix alerter with an **email address** and create a personal user token with **ticket.agent** permissions.

## Zabbix Webhook configuration

## Create a global macro

1. Before setting up the **Webhook**, you need to setup the global macro **{\$ZABBIX.URL}**, which must contain the **URL** to the **Zabbix frontend**.

- 2. In the Administration > Media types section, import the Template
  - 3. Open the added **Zammad** media type and set:
  - zammad\_access\_token to the your Personal User Token
  - zammad\_url to the frontend URL of your Zammad installation
  - zammad\_customer to your Zammad user email.
  - zammad\_enable\_tags to true or false to enable or disable trigger tags. Important: if you enable tag support, each tag is set with a separate request.
- 4. If you want to prioritize issues according to severity values in Zabbix, you can define mapping parameters:
  - severity\_<name>: Zammad priority ID
  - 6. Click the Update button to save the Webhook settings.
- 7. To receive notifications in Zammad, you need to create a Zabbix user and add Media with the Zammad type.

For Send to: enter any text, as this value is not used, but is required.

For more information, use the Zabbix

# **30.4 Integrations for Issue Trackers**

## 30.4.1 GitHub

Use GitHub integration to track GitHub issues directly within Zammad tickets. Add issue hyperlinks and get a live summary of metadata like status (open/closed), assignee, labels, and more.

۹ 🔏	Twitter	🕖 GitHub				
Ø Dashboard	Facebook	This service allows you to connect GitHub with Zammad.				
Cverviews	Telegram	Settings				
Knowledge Base	Settings	NAME	VALUE			
Customer Chat	Branding	Endpoint *	https://api.github.com/graphql			
	System	API token *				
C Phone 2	Security					
• Thanks! Great service!	Ticket	Save				
• complaint wrong delivery of ord	Custo m					
Order 887956	System					
🌆 Awesome Customer Inc.	Integrations					
👤 Anna Lopez	API					

Note: GitHub integration does not support pull requests.

#### Setup

1. In your GitHub settings, create a new API token under **Developer settings > Personal access tokens > Gener**ate new token. Leave the **Scopes** section empty.

Fig. 9: Create a new API key with no scopes/privileges.

#### Hint: Will this work for private repos?

No. To link private repo issues, **use the** repo **scope instead**. Bear in mind that the resulting token will have lots of permissions that it doesn't actually need, which presents a security risk if your token ever falls into the wrong hands.

Unfortunately, because of how GitHub's OAuth token scopes are set up, this is the only way to link issues on private repos.

2. Enter your new API token in Zammad and enable GitHub integration.

Hint: Leave the default API endpoint (https://api.github.com/graphql) as-is unless you're using GitHub Enterprise Server.

Once completed, a new GitHub issues tab will appear in the ticket pane.

## Troubleshooting

Token verification is taking a long time Slight delays are normal (<2 min.), especially for systems under heavy load.

Self-hosted administrators, please check your network settings to ensure that your Zammad server can reach api.github.com.

I reloaded the page and now the API token is gone This may indicate that Zammad is still verifying your API token. Try reloading the page again in a couple minutes.

## 30.4.2 GitLab

Use GitLab integration to track GitLab issues directly within Zammad tickets. Add issue hyperlinks and get a live summary of metadata like status (open/closed), assignee, labels, and more.

Note: GitLab integration does not support merge requests.

## Setup

1. In your GitLab preferences, create a new API token under Access Tokens.

Under Select scopes, choose read\_api only.

Hint: If you wish to link issues on any private repos...

Q	Twitter  Facebook Telegram	GitLab This service allows you to connect GitLab with Zammad. Settings					
Knowledge Base	Settings	NAME	VALUE				
Customer Chat	Branding	Endpoint *	https://gitlab.com/api/graphql				
Phone 2	System	API token *					
	Security Ticket	Save					
	Sustam						
	System						
	Integrations						
	API						

Your API token must belong to an account with access to those repos.

2. Enter your new API token in Zammad and enable GitLab integration.

Hint: Leave the default API endpoint (https://gitlab.com/api/graphql) as-is unless you're a self-hosted GitLab user.

Once completed, a new GitLab issues tab will appear in the ticket pane.

## Troubleshooting

Token verification is taking a long time Slight delays are normal (<2 min.), especially for systems under heavy load.

Self-hosted administrators, please check your network settings to ensure that your Zammad server can reach gitlab.com.

I reloaded the page and now the API token is gone This may indicate that Zammad is still verifying your API token. Try reloading the page again in a couple minutes.

# **30.5 Other Integrations**

This section will hold any other integration that can't be grouped up (yet).

# 30.5.1 Slack

Note: In order to use this feature, please add a new Slack app to your Workspace. The App you need is called Incoming WebHooks.

## Why do I need this feature?

If you're already using Slack for your team communication, you'll love this feature! Our Slack integration can push ticket notifications about the last ticket article based on the following events:

- on Ticket creation
- on Ticket updates
- on reached reminders
- a Ticket has escalated
- a Ticket is going to escalate

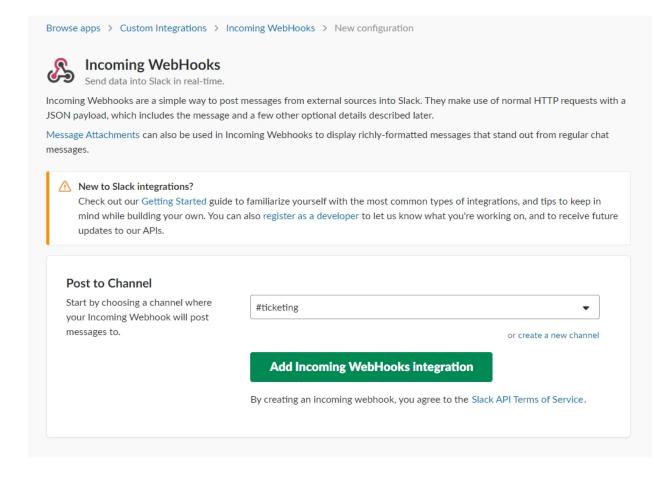
Zammad will provide the Ticket title, a direct link to the Ticket, the event type (creation, updated, escalation), the customer, time and the last article that has triggered the notification. This will give you further options, as you can see e.g. escalating tickets that are assigned to an agent that's e.g. absent. You can interact faster, as you might see problems earlier (or even before the problem gets one).

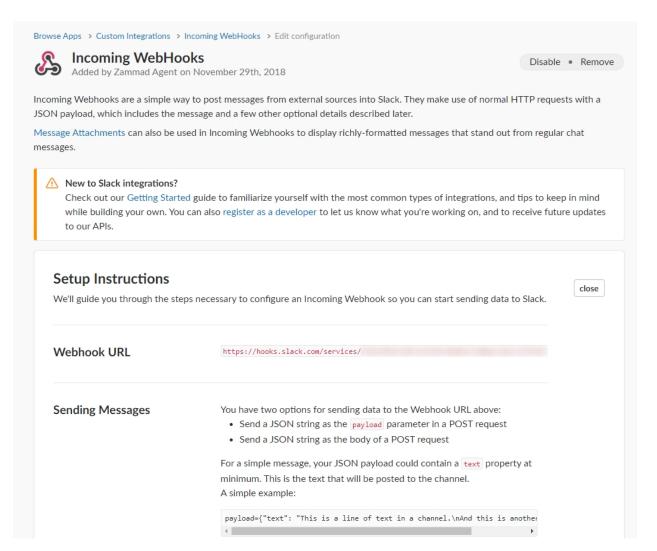
If needed and wanted, you can even discuss directly about the topic before sending an answer to the customer. Another possible use case would be a agent monitoring new agents and their answers to tickets.

## Configure the integration

First of all, please go to your slack workspace - go to administration => Manage Apps. If you don't have an app yet, you can simply add a new one - just search for "Incoming WebHooks" and customize the app to your needs. Choose (or create) the channel Zamma should post it's information to and press on "Add Incoming WebHooks integration". If you're ready, copy the provided WebHook URL and go to your Zammad installation.

**Hint:** You need administrative rights on the Slack Workspace. The link to the app directory is normally https:// [workspace-name].slack.com/apps.

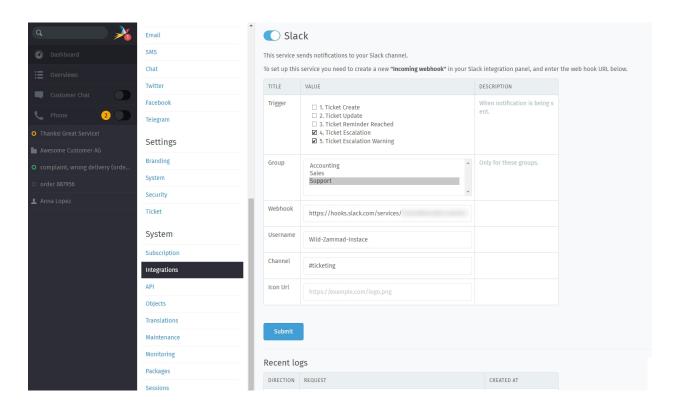




To configure the slack integration, log in to Zammad and go to Integrations (System) => Slack in the admin panel. Here you can choose on what evens Zammad should post information about a ticket to your Slack channel. Next you need to device what groups shall be affected by this, as anybody with access to that specific Slack channel can read at least parts of the ticket this might be a privacy issue, if you select the wrong groups. The username is simply the name that Zammad uses as display name inside the Slack chat. The channel defines the Slack channel the information is being posted in. As last option, you can set a custom icon for posting to slack.

When you're ready, just hit "Submit" and enable the integration. Zammad will now post new ticket information based on the trigger you chose. Below the options you have the recent log that shows the latest requests to Slack for debugging if needed.

**Note:** If you leave the icon URL empty, Zammad will use the Zammad logo instead. The icon should be a square PNG file.

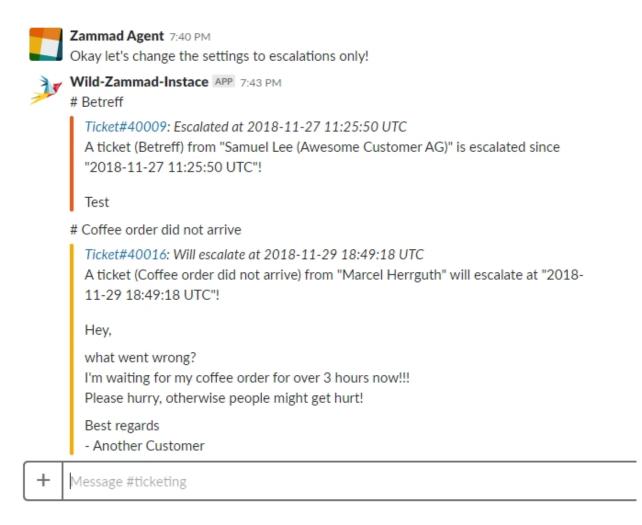


## The result

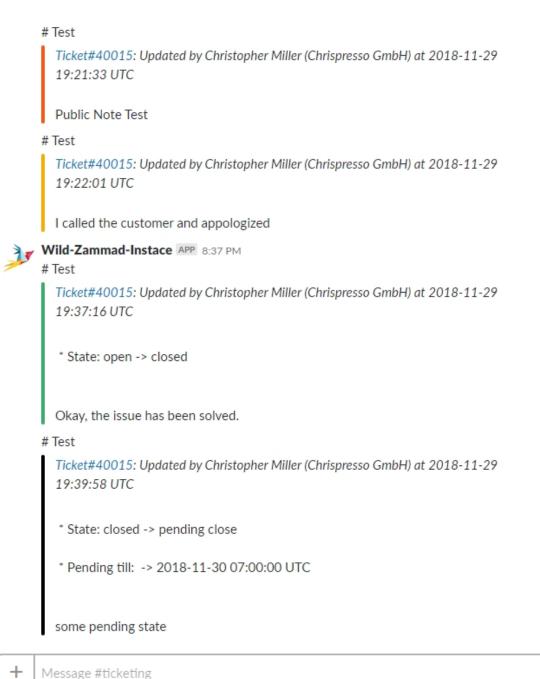
The following figure shows how it will look if you choose to receive updates on created and updated tickets. On every post Zammad sends to the Slack channel, you can create new threads to discuss about the new article.

Super-Zammad 🗸 🎧			600	Q Search	@ ☆ :
<ul> <li>Zammad Agent</li> </ul>	12 8	1   % 0   Ø Add a topic			
All Threads		* Group: Support * Owner: -		Thread #ticketing	×
Channels 🕀		* State: open		HUCKEUIg	
# general		Test		Wild-Zammad-Instace APP Today at 7:34 PM	
# magical-stuff	3-	Wild-Zammad-Instace APP 7:31 PM		# Coffee order did not arrive	
# random		# Test		Ticket#40016: Created by Marcel Herrguth at 2018	-11-29
# ticketing		Ticket#40015: Updated by Christopher Miller (Chrispresso GmbH) at 2018-11-29 18:31:21 UTC		18:34:18 UTC * Group: Support	
Direct Messages ④ <ul> <li>slackbot</li> </ul>		Test!		* Owner: - * State: new Show more	
Zammad Agent (you)		# Test		1 reply	
+ Invite People		Ticket#40015: Updated by Christopher Miller (Chrispresso GmbH) at 2018-11-29 18:31:40 UTC		Cammad Agent < 1 minute ago oh that's not good!	
Apps 🕀		Okay that's like really awesome!		+ Reply	٢
		# Test			
		Ticket#40015: Updated by Christopher Miller (Chrispresso GmbH) at 2018-11-29 18:31:56 UTC			
		Some phone call with Customer!			
	1	Wild-Zammad-Instace APP 7:34 PM # Coffee order did not arrive			
		Ticket#40016: Created by Marcel Herrguth at 2018-11-29 18:34:18 UTC			
		* Group: Support			
		* Owner: - * State: new			
		Hey,			
		what went wrong?			
		I'm waiting for my coffee order for over 3 hours now!!! Show more			
		Instruction Trade at 7:34 PM			
	+	Message #ticketing	00		

If you just want to keep track of soon escalating or already escalated tickets, it will look the the following figure. Zammad changes the color in front of the post so you can easily see the state of the ticket.



If you change the state, Zammad will also put information on what state the ticket gets and (if pending state) the date until it pends. You'll also recognize the color codes in front of posts on slack, as they are exact the same the ticket state colors you'll see in Zammad!



Message #LICKetin

## 30.5.2 i-doit

i-doit is an open-source **configuration management database**—in other words, a tool for keeping tabs on every single piece of your physical and digital infrastructure, from network equipment to virtual machines on down to the faceplates on your rack shelves and more.

What's that got to do with Zammad? Well, if you used tickets to track issues with all that hardware, you might start wishing there was a way they could talk to each other.

Zammad gives you two:

## 1. Add i-doit Links to Zammad Tickets

#### What users see

Fig. 10: The i-doit integration will appear under a new tab in the ticket pane.

i-doit integration puts a new tab in Zammad's ticket pane where you can add links to existing i-doit devices for easy reference. (See our user documentation to learn how it works in practice).

## How to set it up

Note: Requires i-doit's API Add-on. Use the following settings:

Active Yes

Enforce autentication by username and password No

To set it up, enable the integration in the Zammad admin panel under System > Integrations > i-doit:

🚺 i-doit

This service allows you to connect i-doit with Zammad.

## Settings

NAME	VALUE					
API token *	1234					
Endpoint *	https://example.local/i-doit/					
Client ID	42					
Save						
Recent logs						
Recent logs	NO ENTRIES					

**API token\*** Found in the i-doit admin panel under **Interfaces / external data > JSON-RPC API > Common Settings**.

**Endpoint\*** The root URL of your i-doit installation.

i-doit my-doit	Software	Infrastructure	Other	Contact	CMDB-Explorer	Extras			
Administration		Administrat	ion						
🗉 🦲 CMDB settings		Edit 🐵 Link to this page							
⊡ 😋 Interfaces / external d ⊡ 🥁 Import	ata	JSON-RPC API							
E B JSON-RPC API		Common settings							
Categories and attributes			API-Key	No. Considered	1 C				
🗄 🗀 LDAP				Activate JSON-R	PC API				
				Enforce authent	ification by username and	l password			
E Cicence administration			Log level	disabled					
System tools									
⊞ Oser settings									

Client ID A unique name to identify Zammad within i-doit.

(Zammad does not require you to enter a value here, but i-doit might!)

## 2. List / Create Zammad Tickets in i-doit

#### What users see

i-doit's ticket system integration gives you a way to see all the tickets for a given device without ever leaving i-doit. (See our user documentation to learn how it works in practice).

#### How to set it up

Enable this integration in the i-doit admin panel under Interfaces / external data > Trouble Ticket System (TTS) > Configuration:

i-doit	my-doit	Software	Infra	structure	Other	Contact	CMDB-Explorer	Extras	
Admin Admin Au Au Au Au Au Au Au Au Au Au	istration thorization system IDB settings terfaces / external data Import JSON-RPC API		Edit Trouble	Administration 60 Link to this pu Ticket System (1) gured user has to be URL in	age TTS) TTS-Type Active Username Password e authorized fo ici, protocol	Zammad Yes chris@ 	s (e.g. SOAP, REST - depr	ending on ticketing	g system) to the ticket system. Generally every administrator is allowed to.
B 🛄 03	er setungs		THE OKE	ony contains are par	un to une meb	root or the ackeding	system, Examples, http://	raexamprescompr	e or nep.//ousiexample.com/ous

#### TTS-Type Zammad

Username / Password Login credentials for a Zammad agent.

Note: This agent must have read permission for all groups that plan on using the i-doit integration.

You may even wish to create a dedicated agent account just for this integration. (Otherwise, if the agent ever changes her password, you will have to remember to update it here.)

URL incl. protocol https://your.zammad.domain

# 30.5.3 Elasticsearch (SaaS)

The Elasticsearch integration allows you to create a read-only user to use with your favorite reporting tool (e.g. like Grafana).

If you want to take full advantage of the Zammad reporting, have a look at our Grafana setup page as well.

### Warning: Hosted environment specific

This integration is only available for Hosted setups. In order to use Elasticsearch you'll need the **Plus** subscription. Self hosted users have all the control over their self hosted Elasticsearch instances.

Facebook	Elasticsearch							
Telegram	With Elasticsearch access, it is possible to connect reporting tools directly to Elasticsearch or create your own queries.							
Settings	For security reasons, access is password and IP protected.							
Branding	Connection Settings							
System	VALUE COMMENT							
Security	URL https:// .zammad.com							
Ticket	Software	Elasticsearch 7+						
System	Authentication	BasicAuth						
Subscription	Available Indexes							
Integrations	INDEX COMMENT							
API	a server pression in		ticket information					
Objects	a. 201700. prairies . 20		user information					
Translations	10.000000 protection . 10		chat information					
Data Privacy	10, 2017/000, production, 21		cti information					
Maintenance								
Monitoring	Credentials							
Packages	USER		PASSWORD					
Sessions	1710 - 12100 - 12100 - 12100 - 12100 - 1210 - 1210 - 1210 - 1210 - 1210							
Version								

## Limitations

Please note the following limitations of Elasticsearch access on hosted environments:

- · access to the Elasticsearch index is read-only access
- currently you're limited to user only
- Reporting tools that require to write into the indexes (like Kibana) are not supported
- IP access restriction is currently not yet supported

## **Activating Elasticsearch access**

By default external access to your Elasticsearch index is not active. You can enable the integration at any time if needed.

Please ensure to note down the password provided - you won't have access to it afterwards.

## **Connection Settings**

This section holds the most important general information for accessing your Elasticsearch indexes - such as:

URL A unique subdomain that does not tell your real instance URL.

Software The major version of the search index being used. This is required by some Reporting tools like Grafana.

Authentication The authentication type being supported. Basic Authentication

#### **Available Indexes**

Within this section we're displaying the -in our opinion- most important indexes for a Zammad instance.

```
Tip: If you require all indexes or our listing is not good enough for you, point your browser to the URL we're providing and append /_aliases?pretty=true. The result should look like so: https://<URL>.zammad. com/_aliases?pretty=true.
```

Your browser will automatically ask for your credentials - you'll then see something like this:

```
{
  "XXXXXXXX" : {
     "aliases" : { }
  },
  "XXXXXXXX_cti_log" : {
     "aliases" : { }
  },
  "XXXXXXX_knowledge_base_answer_translation" : {
     "aliases" : { }
  },
  "XXXXXXXX ticket" : {
      "aliases" : { }
  },
  "XXXXXXX_knowledge_base_category_translation" : {
      "aliases" : { }
  },
  "XXXXXXXX knowledge base translation" : {
      "aliases" : { }
  },
  "XXXXXXXX_ticket_state" : {
     "aliases" : { }
  },
  "XXXXXXXX user" : {
      "aliases" : { }
  },
  "XXXXXXX_stats_store" : {
      "aliases" : { }
  },
  "XXXXXXXX chat session" : {
   "aliases" : { }
  },
  "XXXXXXX_group" : {
   "aliases" : { }
  },
  "XXXXXXXX_ticket_priority" : {
      "aliases" : { }
  },
```

(continues on next page)

(continued from previous page)

```
"XXXXXXXX_organization" : {
    "aliases" : { }
}
```

#### Credentials

}

Within this section Zammad displays your available users. The password is provided once (upon activation) and cannot be retrieved after that.

#### Note: I need my Elasticsearch user password to be changed

Currently setting the integration to inactive and back to active again does the trick. We're working on a better solution!

Above does not change indexes.

## Objects

In Zammad you can add your own fields to tickets, users, organizations and even groups. This can be useful if you need to add further information to a ticket that you don't want to have in a note (you'll find it easier).

ne Accounting	Ticket User Organization Gr	oup	1
nannels	Ticket Object Manager		New Attr
eb	2 <sup>DISPLAY</sup>	NAME	TYPE ACTION
m	Customer	customer_id	user_autocompletion
ail	Title	title	input
t	Туре	type	select
gram	Group	group_id	select
	Owner	owner_id	select
ttings	State	state_id	select
nding	Pending till	pending_time	datetime
em	Priority	priority_id	select
urity	Tags	tags	tag
et	FinishUntil	finishuntil	date 🔒
stem	SLAwindow	slawindow	select 🖀
scription	3		
grations			

**Note:** Try to avoid deleting objects (rather disable them) as Zammad might run into unexpected conditions if they where referenced somewhere.

Here's an overview of the objects. On the upper right you can add new Attributes (no 1). By default, there will be no custom fields - standard objects (no 2) will be grayed out, you can't delete or change those. Custom objects (no 3) will be displayed in black font and have a trash bin on the right site to delete not needed objects. By click on custom objects, you can edit them so they can suite your needs.

## 31.1 Object types

Hint: Starting with Zammad 3.2 you can create dynamic URL-Fields for select and text attributes. See more below!

When adding a new object, you can choose between the following object types:

- Boolean
  - true or false, you can adjust the display for those keys and mark a default one.
- Date
- enables you to use the date picker of Zammad.
- you can allow / forbid the date chosen to be in the future and in past.
- set the standard time difference in hours, which is entered as the default value if no value is defined.
- Date-time
  - enables you to use the date picker plus time selection of Zammad.
  - you can allow / forbid the date chosen to be in the future and in past.
  - set the default time difference in hours.
- Integer
  - you can set the default value of this field.
  - you can configure the minimum and maximum value that can be used.
- Select
- you can add as many selections you need, you'll see the field as drop-down menu.
- they key and display name can differ (display name can be translated if needed).
- You can select a default value for this field, if you want to.
- Allows you to define a URL if needed
- Text
- you can enter a default value.
- you can choose between the following types: email, phone, text, or URL.
- you can pick the maximum length of the field.
- Allows you to define a URL if needed
- Tree Select
  - this object enables you to use up to 6 sub keys.
  - you'll see this object as a kind of drop down menu.

**Note:** You cannot change the object format / type as soon as you applied it. If you don't further need an object, you can disable it.

## 31.2 URL fields (Link-Template)

**Note:** This option is available within Zammad 3.2 and later. This function is restricted to Text and Select objects only.

Link-Templates are an amazing way to dynamically generate URLs. This allows you to integrate other systems better, without having the need to manually copy an URL! As soon as field is set and updated, a URL-Icon will appear, allowing you to open the link in a new tab.

**Hint:** Even though the Link-Template field shows up within the object edition, it is optional and not used if you don't fill in anything.

#### 31.2.1 How does this work...?!

The Link-Template can consist of static and dynamic parts. This means that you can, for exmaple, create a URL for a google search by defining the following:

https://www.google.com/search?q=#{ticket.amazingobject}

The above will create a google search link which will contain the search phrase (which is the objects value). You can use any variable that's available within Zammad! This gives your great options within your structures!

Learn more about Variables.

Fig. 1: The above screencast shows how the link template will perform after object creation.

## 31.3 Object permissions

When ever needed you can restrict access to objects for permission roles (agents and customer) and even set a object to be required.

- During Ticket Creation
  - show / hide the field.
  - make the field required (if needed).
- During Updating a Ticket
  - show / hide the field.
  - make the field required (if needed).

**Hint:** You can't change these settings for pre defined objects (as you can't edit them via UI). Please note that this currently works as designed.

		Edit:	User		
NAME *					
slaresponse					
DISPLAY *					
SLA response ti	ime				
ACTIVE *					
active					~
FORMAT *					
Select					~
KEY 2h 4h		DISPLAY	DISPLAY DEFAULT 2 hours		ACTION
		2 hours			
		4 hours	4 hours <ul> <li></li></ul>		
Кеу	Кеу				
LINK-TEMPL	ATE				
https://ex	ample.com/?q=#{ticl	ket.attribut	e_name}		
Here you define v	which authorization I	has access	to the attribute.		
PERMISSIONS	SCREEN		OPTIONS		
ticket.customer					
	create		shown: 🗹 required: 🛙		
	view		shown: 🗹		
ticket.agent		signup shown: 🗆 requir		ired: 🗆	
	create		shown: 🗹 required: 🕻		
	view		shown: 🗹 required: 🛙		Chapter 31.

## **31.4 Updating database after adding or editing objects**

**Hint:** Zammad doesn't restart automatically and prompts you to restart? You may want to check configure environment variables to solve this.

Note: If you're on a self hosted system, you might need console access to your Zammad-Server to restart the service.

When adding or changing objects, Zammad will not apply the changes isntantly, but instead shows you the changed objects first. If you're ready to go, just click on "Update database" to apply the changes to Zammad. If you made a mistake or just want to discard your changes, click "Discard changes".

Database Update required	
Changes were made that require a database update. This might take some time where the system execute database changes only in a maintenance time-slot.	can't be used. Please
Changes:	
<ul><li>Create: Ticket.amazingobject (input)</li><li>Create: User.slaresponse (select)</li></ul>	
Discard Changes	Update Database

Fig. 3: Changes on objects require you to update the database to apply these changes.

### Variables

**Note:** Please note that this is just an overview of available variables. It might be incomplete or variables might not be available within some functions. If you're missing variables or are not sure if something is not working as expected, feel free to ask over at the Community.

Variables can be called by typing :: (just like text modules in the frontend), as long as you're in a supported text field within the Backend. Zammad will show display all variables being available within this context and replace it to the variable as soon as you selected an entry.

**Hint:** You have an empty field which you referenced and it appears as -? That's currently working as designed - you might want to ensure that these fields always have a value (in text fields " " is a value!).

### 32.1 Variable Categories

#### 32.1.1 Config

**Note:** If you're missing variables or are not sure if something is not working as expected, feel free to ask over at the Community.

Below you'll find config related variables. These hold useful configuration information that you can use within e.g. triggers to show necessary information to your customer.

The below list gives you an example what kind of data you can expect, it's not intended to explain the data itself.

	•	
name	variable	example
Config > Fully Qualified Domain Name	#{config.	zammad.example.com
	fqdn}	
Config > Ticket Hook	#{config.	Ticket#
	ticket_hook}	
Config > HTTP type	#{config.	https or http
	http_type}	
Config > SystemID	#{config.	31 (value between 1 and 99)
	system_id}	
Config > Organization	#{config.	Zammad GmbH value set in Branding
	organization}	
Config > Product Name	#{config.	Helpdesk value set in Branding
	product_name}	

Table 1: Config Variables	Table	1:	Config	Variables
---------------------------	-------	----	--------	-----------

#### 32.1.2 Current User

**Note:** If you're missing variables or are not sure if something is not working as expected, feel free to ask over at the Community.

Current user variables always return values of the current user that caused e.g. a trigger to run.

Note: Due to the above fact, these variables are often not (yet) set or available for usuage.

In situations where e.g. schedulers or triggers run, this most likely is nothing you want to use.

1	able 2. Current User va	
name	variable	example
Current User > Web	#{user.web}	https://zammad.org or empty if not
		set
Current User > VIP	#{user.vip}	false or true
Current User > Updated by > Web	#{user.	https://zammad.org or empty if not
	updated_by.	set
	web}	
Current User > Updated by > VIP	#{user.	false or true
	updated_by.	
	vip}	
Current User > Updated by > Phone	#{user.	004930123456789 or empty if not set
	updated_by.	
	phone }	
Current User > Updated by > Note	#{user.	Some note to this user or empty
	updated_by.	if not set
	note}	
Current User > Updated by > Mobile	#{user.	0049176123456789 or empty if not set
	updated_by.	
	mobile}	
		Continued on post page

Table 2: Current User Variables

	<ul> <li>continued from prev</li> </ul>	· · ·
name	variable	example
Current User > Updated by > Login	#{user.	jdoe
	updated_by.	
	login}	
Current User > Updated by > Lastname	#{user.	Doe or empty if not set
	updated_by.	
	lastname}	
Current User > Updated by > Firstname	#{user.	John or empty if not set
	updated_by.	
	firstname}	
Current User > Updated by > Fax	#{user.	004930123464789 or empty if not set
	updated_by.	
	fax}	
Current User > Updated by > Email	#{user.	jdoe@customer.tld
	updated_by.	
	email}	
Current User > Updated by > Department	#{user.	Sales or empty if not set
	updated_by.	
	department}	
Current User > Updated by > Address	#{user.	Some street 1, 12345 Berlin or
	updated_by.	empty if not set
	address}	
Current User > Updated at	#{user.	2019-10-07 16:25:00 UTC
-	updated_at}	
Current User > Phone	#{user.phone}	004930123456789 or empty if not set
Current User > Organization > Shared orga-	#{user.	true or false
nization	organization.	
	shared}	
Current User > Organization > Note	#{user.	A note to the organization of
ç	organization.	the user or empty if not set
	note}	
Current User > Organization > Name	#{user.	
-	organization.	
	name}	
Current User > Organization > Domain	#{user.	
based assignment	organization.	
C C	domain_assignme	ent}
Current User > Organization > Domain	#{user.	Zammad GmbH or empty if not set
C	organization.	1 7
	domain}	
Current User > Note	#{user.note}	Some note to this user or empty
		if not set
Current User > Mobile	#{user.	0049176123456789 or empty if not set
	mobile}	1,5
Current User > Login	#{user.login}	jdoe
Current User > Lastname	#{user.	Doe or empty if not set
	lastname}	· · · · · · · · · · · · · · · · · · ·
Current User > Firstname	#{user.	John or empty if not set
	firstname}	
Current User > Fax	#{user.fax}	004930123464789 or empty if not set
Current User > Email	#{user.email}	jdoe@customer.tld
	T (USEL·EMAIL)	Jace@customer.tra

Table 2 – continued from previous p	page
-------------------------------------	------

name	variable	example
Current User > Department	#{user.	Sales or empty if not set
	department }	
Current User > Created by > Web	#{user.	https://zammad.org or empty if not
	created_by.	set
	web}	
Current User > Created by > VIP	#{user.	true or false
	created_by.	
	vip}	
Current User > Created by > Phone	#{user.	004930123456789 or empty if not set
	created_by.	······································
	phone }	
Current User > Created by > Note	#{user.	Some note to this user or empty
	created_by.	if not set
	note}	
Current User > Created by > Mobile	#{user.	0049176123456789 or empty if not set
	created_by.	
	mobile}	
Current User > Created by > Login	#{user.	jdoe
Carrent Coort Created Cy / Login	created_by.	
	login}	
Current User > Created by > Lastname	#{user.	Doe or empty if not set
	created_by.	
	lastname}	
Current User > Created by > Firstname	#{user.	John or empty if not set
	created_by.	· · · · · · · · · · · · · · · · · · ·
	firstname}	
Current User > Created by > Fax	#{user.	004930123464789 or empty if not set
	created_by.	I I I I I I I I I I I I I I I I I I I
	fax}	
Current User > Created by > Email	#{user.	jdoe@customer.tld
2	created_by.	
	email}	
Current User > Created by > Department	#{user.	Sales or empty if not set
	created_by.	
	department}	
Current User > Created by > Address	#{user.	Some street 1, 12345 Berlin or
-	created_by.	empty if not set
	address}	
Current User > Created at	#{user.	2019-10-07 16:25:00 UTC
	created_at}	
Current User > Address	<pre>#{user.</pre>	Some street 1, 12345 Berlin or

#### Table 2 – continued from previous page

#### 32.1.3 Articles

**Note:** If you're missing variables or are not sure if something is not working as expected, feel free to ask over at the Community.

Below you can find all available ticket article-based variables within Zammad. These can be called via Triggers for

example. If you're unsure if Zammad does support variables at the point you're at, you can try to type : : to check. The below list gives you an example what kind of data you can expect, it's not intended to explain the data itself.

name	variable	example
Article > Updated by > Web	#{article.	https://zammad.com or empty if not
There > Optimed by > Web	updated_by.	set in user object
	web}	
Article > Updated by > VIP	#{article.	true or false
Theore > Optimical by > + II	updated_by.	
	vip}	
Article > Updated by > Phone	#{article.	+4930123456789 or empty if not set in
There > Optimed by > Thone	updated_by.	user object
	phone }	
Article > Updated by > Note	#{article.	Some note about user or empty if
There > Optimed by > Trote	updated_by.	not set in user object
	note}	not set in user object
Article > Updated by > Mobile	#{article.	+4930123456789 or empty if not set in
Anticle > Optimed by > Mobile	updated_by.	user object
	mobile}	
Article > Updated by > Login	#{article.	jdoe
Thursday optimized by 7 Login	updated_by.	
	login}	
Article > Updated by > Lastname	#{article.	Doe or empty if not set
Finder of and of a Lashame	updated_by.	
	lastname}	
Article > Updated by > Firstname	#{article.	Joe or empty if not set
	updated_by.	
	firstname}	
Article > Updated by > Fax	#{article.	+4930123456789 or empty if not set in
1 5	updated_by.	user object
	fax}	5
Article > Updated by > Email	#{article.	jdoe@example.com
1 2	updated_by.	
	email}	
Article > Updated by > Department	#{article.	Sales or empty if not set in user object
	updated_by.	
	department}	
Article > Updated by > Address	#{article.	Some street 1, 12345 Berlin or
•	updated_by.	empty if not set in user object
	address}	
Article > Updated	#{article.	2019-10-08 15:24:47 UTC
-	updated_at}	
Article > Type > Name	#{article.	email (list of article types)
	type.name}	
Article > To	#{article.to}	helpdesk@example.com
Article > TicketID	#{article.	1 (not ticket number)
	ticket_id}	
Article > Subject	#{article.	My amazing subject

Table 3: Article Variables

	example
	Customer, Agent or System
· · · · · · · · · · · · · · · · · · ·	false or true (false if not internal)
	Taise of true (lase if not internal)
	Joe Doe <jdoe@example.com> may</jdoe@example.com>
	•
	differ, depends on FROM of send mail https://zammad.com or empty if not
	set in user object
	true or false
_	+4930123456789 or empty if not set in
	user object
	user object
=	Some note about user or empty if
	not set in user object
-	not set in user object
	+4930123456789 or empty if not set in
	user object
-	user object
	jdoe
	Jace
	Doe or empty if not set
	Doe of empty if not set
-	
	Joe or empty if not set
	obe of empty if not set
	+4930123456789 or empty if not set in
	user object
	jdoe@example.com
	Jaceterampre.com
email}	
	Sales or empty if not set in user object
#{article.	Sales or empty if not set in user object
<pre>#{article. created_by.</pre>	Sales or empty if not set in user object
<pre>#{article. created_by. department}</pre>	
<pre>#{article. created_by. department} #{article.</pre>	Some street 1, 12345 Berlin or
<pre>#{article. created_by. department}</pre>	
<pre>#{article. created_by. department} #{article. created_by.</pre>	Some street 1, 12345 Berlin or
<pre>#{article. created_by. department} #{article. created_by. address} #{article.</pre>	Some street 1, 12345 Berlin or empty if not set in user object
<pre>#{article. created_by. department} #{article. created_by. address} #{article. created_at}</pre>	Some street 1, 12345 Berlin or empty if not set in user object 2019-10-08 15:24:47 UTC
<pre>#{article. created_by. department} #{article. created_by. address} #{article.</pre>	Some street 1, 12345 Berlin or empty if not set in user object 2019-10-08 15:24:47 UTC jdoe@example.com,
<pre>#{article. created_by. department} #{article. created_by. address} #{article. created_at} #{article.cc}</pre>	Some street 1, 12345 Berlin or empty if not set in user object 2019-10-08 15:24:47 UTC jdoe@example.com, company@example.com
<pre>#{article. created_by. department} #{article. created_by. address} #{article. created_at} #{article.cc} #{article.cc}</pre>	Some street 1, 12345 Berlin or empty if not set in user object 2019-10-08 15:24:47 UTC jdoe@example.com,
<pre>#{article. created_by. department} #{article. created_by. address} #{article. created_at} #{article.cc}</pre>	Some street 1, 12345 Berlin or empty if not set in user object 2019-10-08 15:24:47 UTC jdoe@example.com, company@example.com
	<pre>- continued from prev variable # {article. sender.name} # {article. internal} # {article. from} # {article. created_by. web} # {article. created_by. vip} # {article. created_by. phone} # {article. created_by. note} # {article. created_by. note} # {article. created_by. note} # {article. created_by. login} # {article. created_by. login} # {article. created_by. login} # {article. created_by. lastname} # {article. created_by. firstname} # {article. created_by. firstname] # {article. created_by. firstname] # {article. created_by. firstname] # {article. created_by. firstname] # {article. created_by. firstname] # {article. created_by. first</pre>

#### Table 3 – continued from previous page

Table 3 – continued from previous page				
name	variable	example		
Ticket > Article#	#{ticket.	1 number of ticket articles		
	article_count}			

Table	3 –	continued	from	previous	page
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#### 32.1.4 Ticket

Note: If you're missing variables or are not sure if something is not working as expected, feel free to ask over at the Community.

Below you can find all available ticket-based variables within Zammad. These can be called via Triggers for example. If you're unsure if Zammad does support variables at the point you're at, you can try to type :: to check.

The below list gives you an example what kind of data you can expect, it's not intended to explain the data itself.

name	variable	example
Ticket > Updated by > Web	#{ticket.	https://zammad.org or empty if not
	updated_by.	set
	web}	
Ticket > Updated by > VIP	#{ticket.	false or true
	updated_by.	
	vip}	
Ticket > Updated by > Phone	#{ticket.	004930123456789 or empty if not set
	updated_by.	
	phone}	
Ticket > Updated by > Note	#{ticket.	Some note to this user or empty
	updated_by.	if not set
	note}	
Ticket > Updated by > Mobile	#{ticket.	0049176123456789 or empty if not set
	updated_by.	
	mobile}	
Ticket > Updated by > Login	#{ticket.	jdoe
	updated_by.	
	login}	
Ticket > Updated by > Lastname	#{ticket.	Doe or empty if not set
	updated_by.	
	lastname}	
Ticket > Updated by > Firstname	#{ticket.	John or empty if not set
	updated_by.	
	firstname}	
Ticket > Updated by > Fax	#{ticket.	004930123464789 or empty if not set
	updated_by.	
	fax}	
Ticket > Updated by > Email	#{ticket.	jdoe@customer.tld
	updated_by.	
	email}	
Ticket > Updated by > Department	#{ticket.	Sales or empty if not set
	updated_by.	
	department}	

Table 4: Ticket Variables

	- continued from prev	
name	variable	example
Ticket > Updated by > Address	#{ticket.	Some street 1, 12345 Berlin or
	updated_by.	empty if not set
	address}	
Ticket > Updated at	#{ticket.	2019-10-07 16:25:00 UTC
	updated_at}	
Ticket > Title	#{ticket.	My amazing Subject (normally sub-
	title}	ject, can be edited within Interface and thus
		differ)
Ticket > Accounted Time	#{ticket.	1, 2.75 or empty response
	time_unit}	
Ticket > Tags	#{ticket.	Currently not available, see Issue 2769
	tags}	
Ticket > State > Name	#{ticket.	new, open,
	state.name}	
Ticket > Priority > Name	#{ticket.	2 normal
	priority.	
	name}	
Ticket > Pending till	#{ticket.	2019-10-07 16:25:00 UTC or empty
-	pending_time}	if not set
Ticket > Owner > Web	#{ticket.	https://zammad.com or empty if not
	owner.web}	set
Ticket > Owner > VIP	#{ticket.	false or true
	owner.vip}	
Ticket > Owner > Phone	#{ticket.	004930123456789 or empty if not set
	owner.phone}	
Ticket > Owner > Note	#{ticket.	Some note to this user or empty
	owner.note}	if not set
Ticket > Owner > Mobile	#{ticket.	0049176123456789 or empty if not set
	owner.mobile}	
Ticket > Owner > Login	#{ticket.	agent
6	owner.login}	
Ticket > Owner > Lastname	#{ticket.	Mustermann or empty if not set
	owner.	1 7
	lastname}	
Ticket > Owner > Firstname	#{ticket.	Max or empty if not set
	owner.	1 2
	firstname}	
Ticket > Owner > Fax	#{ticket.	004930123456789 or empty if not set
	owner.fax}	
Ticket > Owner > Email	#{ticket.	agent@company.tld or empty if not set
	owner.email}	
Ticket > Owner > Department	#{ticket.	Support or empty if not set
	owner.	
	department }	
Ticket > Owner > Address	#{ticket.	Some street 1, 12345 Berlin or
nexet > 0 when > Audress	owner.	empty if not set
	address}	
Ticket > Organization > Shared organiza-	#{ticket.	false or true
tion		
uon	organization.	
	shared}	

#### Table 4 – continued from previous page

name	<ul> <li>continued from prev</li> <li>variable</li> </ul>	example
Ticket > Organization > Note	#{ticket.	A note to the organization of
Tieket > Organization > Note	organization.	the user or empty if not set
	note}	ene user of empty if not set
Ticket > Organization > Name	#{ticket.	Zammad GmbH or empty if not set
Tieket > Organization > Walke	organization.	Zanunaci Gnush of empty if not set
	name}	
Ticket > Organization > Domain based as-	#{ticket.	false or true
signment	organization.	
Significia	domain_assignm	ant }
Ticket > Organization > Domain	#{ticket.	domain.tld or empty if not set
The Ref > Organization > Domain	organization.	domain, erd of empty if not set
	domain}	
Ticket > #	#{ticket.	31001,201910731001,
$ficket > \pi$	number}	51001,201910751001,
Ticket > Last contact (customer)	#{ticket.	2019–10–07 16:25:00 UTC or empty
Ticket > Last contact (customer)	,	usif noteapplicable yet (Please note Ticket last
	last_contact_c	contact behaviour Settings for this)
Ticket > Last contact	#{ticket.	2019-10-07 16:25:00 UTC
Ticket > Last contact	last_contact_a	
Ticket > Last contact (agent)	#{ticket.	2019–10–07 16:25:00 UTC or empty
Ticket > Last contact (agent)		deifinotatipplicable yet
Ticket > Group > Note	#{ticket.	Note about this group
Ticket > Gloup > Note		Note about this group
Ticket > Group > Name	group.note}	Sales
Ticket > Group > Name	#{ticket.	Sales
Tisket Crown & Fallow up asseible	group.name}	
Ticket > Group > Follow-up possible	#{ticket.	no or yes
	group.	
Ticket & Crewer & Assign Fallow Une	follow_up_poss	
Ticket > Group > Assign Follow-Ups	#{ticket.	false or true
	group.	
Ticket > Group > Assignment Timeout	follow_up_assi	20 or empty if not configured
Ticket > Group > Assignment Timeout	#{ticket.	20 or empty if not computed
	group.	
Ticket > First response	<pre>assignment_tim #{ticket.</pre>	2019–10–07 16:25:00 UTC or empty
ricket > First response		
Tislaty Escalation at		aif hot applicable yet
Ticket > Escalation at	#{ticket.	2019-10-07 16:25:00 UTC or empty
T' Late Contained With	escalation_at}	if not applicable
Ticket > Customer > Web	#{ticket.	https://zammad.org or empty if not
	customer.web}	set
Ticket > Customer > VIP	#{ticket.	false or true
	customer.vip}	
Ticket > Customer > Phone	#{ticket.	004930123456789 or empty if not set
	customer.	
	phone }	
Ticket > Customer > Note	#{ticket.	Some note to this user or empty
	customer.	if not set
	note}	Continued on next name

Table 4 – continued from previous page	Table	4 – continued	from	previous	page
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Table 4 – continued from previous page				
name	variable	example		
Ticket > Customer > Mobile	#{ticket.	0049176123456789 or empty if not set		
	customer.			
	mobile}			
Ticket > Customer > Login	#{ticket.	jdoe		
	customer.			
	login}			
Ticket > Customer > Lastname	#{ticket.	Doe or empty if not set		
	customer.			
	lastname}			
Ticket > Customer > Firstname	#{ticket.	Joe or empty if not set		
	customer.			
	firstname}			
Ticket > Customer > Fax	#{ticket.	004930123456789 or empty if not set		
	customer.fax}			
Ticket > Customer > Email	#{ticket.	jdoe@customer.tld		
	customer.			
	email}			
Ticket > Customer > Department	#{ticket.	Sales or empty if not set		
I	customer.	1 2		
	department}			
Ticket > Customer > Address	#{ticket.	Some street 1, 12345 Berlin or		
	customer.	empty if not set		
	address}	······································		
Ticket > Created by > Web	#{ticket.	https://zammad.org or empty if not		
There is cloured by s web	created_by.	set		
	web}			
Ticket > Created by > VIP	#{ticket.	false or true		
The ket > Cleated by > VII	created_by.			
	vip}			
Ticket > Created by > Phone	#{ticket.	004930123456789 or empty if not set		
The Ref > Created by > Thone	created_by.	1004930123430709 of empty if not set		
	phone }			
Ticket > Created by > Note	#{ticket.	Come note to this year or ampty		
Ticket > Cleated by > Note	-	Some note to this user or empty if not set		
	created_by.	II not set		
Tislast Crossed has Mabile	note}	004017(10245(700 or events if not ort		
Ticket > Created by > Mobile	#{ticket.	0049176123456789 or empty if not set		
	created_by.			
	mobile}			
Ticket > Created by > Login	#{ticket.	jdoe		
	created_by.			
	login}	10		
Ticket > Created by > Lastname	#{ticket.	Doe or empty if not set		
	created_by.			
	lastname}			
Ticket > Created by > Firstname	#{ticket.	Joe or empty if not set		
	created_by.			
	firstname}			
Ticket > Created by > Fax	#{ticket.	004930123456789 or empty if not set		
	created_by.			
	fax}			

#### Table 4 – continued from previous page

name	variable	example
Ticket > Created by > Email	#{ticket.	jdoe@customer.tld
	created_by.	
	email}	
Ticket > Created by > Department	#{ticket.	Sales or empty if not set
	created_by.	
	department}	
Ticket > Created by > Address	#{ticket.	Some street 1, 12345 Berlin or
	created_by.	empty if not set
	address}	
Ticket > Created at	#{ticket.	2019-10-07 16:25:00 UTC
	created_at}	
Ticket > Closing time	#{ticket.	2019-10-07 17:25:00 UTC
	close_at}	
Ticket > Article#	#{ticket.	3, any number of articles existing in the
	article_count}	ticket right now

#### Table 4 – continued from previous page

### 32.2 Wait, what about custom objects?

Good point! Of course, we can't predict what objects you might create, but we can give you a hint on how to put the puzzle together to get your custom values.

For this, we'll talk about the inner part of the variable (so everything within # { }), please put the outer part around to have a valid variable. The first part of the variable name consist of the object type. Currently these are:

- Ticket (ticket)
- User (user)
- Organization (organization)
- Group (group)

The second part is the name of the object. This is the name you define during object creation and can be found within the object menu at any time. The first and second part of a variable is divided by a point, e.g.: ticket.number which will in total be #{ticket.number}.

Now, in some situations it's possible that you'll need to use a third part. The best example for such a situation would be a select or tree-select field which will by default return the key value, not it's display name. For this, just extend your variable with .value. This will result in #{ticket.select.value}.

## Translations

In Zammad (as admin) you can translate strings having typos or even not being translated. You can always "Get last translations" to ensure that you're up to date before doing that.

**Note:** The language for translation is always the language you chose within your profile. As Zammad's main language is English, you can't translate into English.

bersetzung Deutsch					
Inline Übersetzung         Um einfacher Übersetzungen pflegen zu können, kann die inline Übersetzung mittels den Tasten "ctrl+alt+t" aktiviert und deaktiviert werden.         Text mit deaktivierter inline Übersetzung sieht wie folgend aus       Ein Text         Text mit aktivierter inline Übersetzung sieht wie folgend aus       Ein Text         Einfach in die Markierung klicken und den Text bearbeiten. Enjoy!       Um die Übersetzungen in einer Liste zu pflegen, einfach die unten fortfahren.					
Datum & Zeit					
ТҮР	ZIEL	ORIGINAL	AKTION		
date	dd.mm.yyyy	dd.mm.yyyy			
timestamp	dd.mm.yyyy HH:MM	dd.mm.yyyy HH:MM			
Wörter					
QUELLE	ZIEL	ORIGINAL	AKTION		
yes	ja	ja			
no	nein	nein			

Translated strings are highlighted within Zammad. If you've translated strings, you have two options: You can send your changes to our central system, this will share your translation with other users. This is a great contribution.

#### Zammad

If you don't like your changes or want to start over, you can discard your changes at any time.

Übersetzung Deutsch	Meine Änderungen Übermitteln				
Inline Übersetzung         Um einfacher Übersetzungen pflegen zu können, kann die inline Übersetzung mittels den Tasten "ctrl+alt+t" aktiviert und deaktiviert werden.         Text mit deaktivierter inline Übersetzung sieht wie folgend aus       Ein Text         Text mit aktivierter inline Übersetzung sieht wie folgend aus       Ein Text         Einfach in die Markierung klicken und den Text bearbeiten. Enjoy!       Um die Übersetzungen in einer Liste zu pflegen, einfach die unten fortfahren.					
Datum & Zeit					
ТҮР	ZIEL	ORIGINAL		AKTION	
date	dd.mm.yyyy	dd.mm.yy	уу		
timestamp	dd.mm.yyyy HH:MM	dd.mm.yy	dd.mm.yyyy HH:MM		
Wörter					
QUELLE	ZIEL	ORIGINAL		AKTION	
yes	ja	ja			
no	vielleicht	nein		Zurücksetzen	

## Data Privacy

For compliance with GDPR and other data privacy laws, you may wish to **permanently delete users from the system**, along with **all of their associated tickets**.

۹ 🏄	Google	Data Drivacy Hanneset Description New Deletion Task
Dashboard	Twitter	New: Deletion Task
Overviews	Facebook	USER *
Knowledge Base	Telegram	Emily Adams
Customer Chat	Settings	Preview customer tickets (2 matches)
	Branding	Customer tickets of the user will get deleted on execution of the task. No rollback possible.       2074, 692071, 692066, 692064, 691997, 691996, 691991,
C Phone 2	System	#         TITLE         CUSTOMER         GROUP         CREATED AT 36, 691958, 691956, 691954, 36, 691917, 691912,
• Thanks! Great service!	Security	O 34008 Thanks! Great s Emily Adams (A Sales 1 day ago 108, 691804, 691800, 691796,
• complaint wrong delivery of ord	Ticket	O 34014 PR material! Emily Adams (A Sales 3 hours 42 mi
Order 887956	System	Warning There is no rollback of this deletion possible. If you are absolutely sure to do this, then type in "DELETE" into
👤 Anna Lopez	Integrations	the input.
👤 Emily Adams	API	ARE YOU SURE? *
• Order 787556	Objects	DELETE
	Translations	
	Data Privacy	Cancel & Go Back Delete
	Maintenance	
	Monitoring	
	Packages	
	Sessions	
🛞 il. 🔹 +	Version	-

Fig. 1: The user deletion dialog lists some of the tickets that will be removed from the system along with the user.

#### Note: Huh? I don't see the Data Privacy panel...

Access to this panel requires admin.data\_privacy permissions (introduced in Zammad 3.5).

On older systems that have not been updated yet, customers can also be deleted via the Zammad console.

### 34.1 Deleting Users

Warning: All deletions are FINAL!

Once you click "Delete", the action cannot be cancelled or undone.

Any time you delete a user, all their tickets will be deleted, as well. It is not possible to delete a user and still keep their tickets.

Note: The following records cannot be deleted:

- your own account
- the system's last remaining administrator account

#### 34.1.1 Step 1: Find a user / confirm deletion

There are three ways to access the user deletion dialog:

from the user's profile

Fig. 2: Click **Action > Delete**.

in the "Manage > Users" Admin Panel

Fig. 3: Use the Actions menu for the target user.

in the "System > Data Privacy" Admin Panel

Fig. 4: Use the New Deletion Task button. Search for users by name or email address.

Hint: You can delete organizations, too.

If the customer you are deleting is the last user in their organization, a **Delete Organization?** option will be displayed in the user deletion dialog:

(If this option does not appear, make sure there are no pending deletion tasks for other customers from this organization.)

Data Drivad	V Manadamant	Desci
	New: Deletion Task	
USER *		
Nicole Braun		
DELETE ORGANIZATION? *		
yes		~

#### 34.1.2 Step 2: Monitor deletion job status

It may take up to ten minutes for the system to process your request, so for each user you delete, a "deletion task" is added to the queue. You can keep an eye on the status of these tasks in two places:

#### in the Activity Stream

Q 💦	м	y Stats First Steps		Activity Stream
E Overviews	Ø WAITING TIME TODAY ⑦	MOOD ⑦	CHANNEL DISTRIBUTION	updated data privacy task to delete user id <b>8</b> just now
Knowledge Base  Customer Chat  Phone  Phone  Customer Chat  Customer Chat  Customer Chat Customer C	My handling time: 0 minutes	0 of my tickets escalated.	ы. <b></b>	Christopher Miller created data privacy task to delete user id 8 7 minutes ago
<ul> <li>complaint wrong delivery of ord</li> <li>Order 887956</li> </ul>	Average: 0 minutes	Total: 0 YOUR TICKETS IN PROCESS ⑦	38% 41% 16% 5%	Christopher Miller started a new session 23 minutes ago
Awesome Customer Inc.			9	Christopher Miller ! updated Ticket Order 777555 1 hour 13 minutes ago
• Order 787556	Tickets assigned to me: 34 of 233 Average: 24	85% are currently in process Average: 79%	2% have been reopened Average: 0%	- created Ticket Heads up     ↓!     1 hour 29 minutes ago
				Anna Lopez updated ! Ticket <b>Order 777555</b> 1 hour 34 minutes ago
				David Bell created Ticket complaint wrong delivery of order #51519891 2 hours 4 minutes ago
🋞 il. 🗢 +				Ryan Parker created Ticket <b>Order 887956</b> 2 hours 4 minutes ago

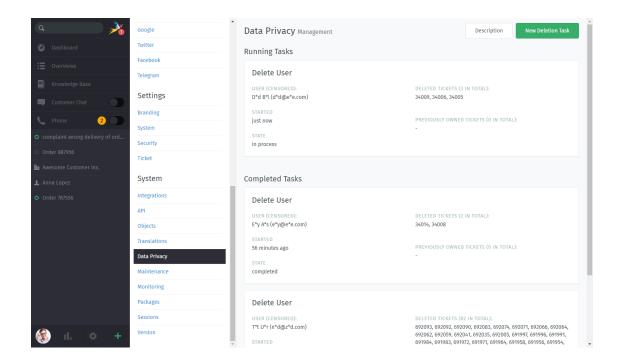
For each deleted user, the Activity Stream will be updated twice—once when the task is created, and once when it's complete.

Hint: These notifications are only visible to users with admin.data\_privacy permissions.

in the "System > Data Privacy" Admin Panel

## 34.2 Frequently Asked Questions

What happens if I receive an email from a deleted customer? Zammad automatically creates a new user account whenever it receives a message from an unrecognized email address, including deleted users. Deleted users are never blocked from creating new tickets.



In the unlikely event that you receive an email between the time that you click "Delete" and the system has processed your request, **that ticket will be automatically removed**. The ticket number for the lost ticket will be displayed in the Admin Panel under **System > Data Privacy > Completed Tasks > Delete User > Deleted Tickets**.

What about user information stored in internal notes or other messages? The deletion process removes user accounts and associated tickets only.

If there are references to a user's name or information stored elsewhere in the system, that information **will not be removed** because there is no way to safely determine if it actually describes the user in question.

I deleted an user and can still see a message they sent! Tickets can only belong to a single customer, but may contain messages ("articles") from many people. If you deleted a user but you're still seeing articles they sent, don't worry—those articles are for a ticket that belongs to someone else, and no longer contain any reference to the sender's identity.

## Maintenance

If maintenance work on the system is necessary, a number of preparations must be made. You can take care of them here.

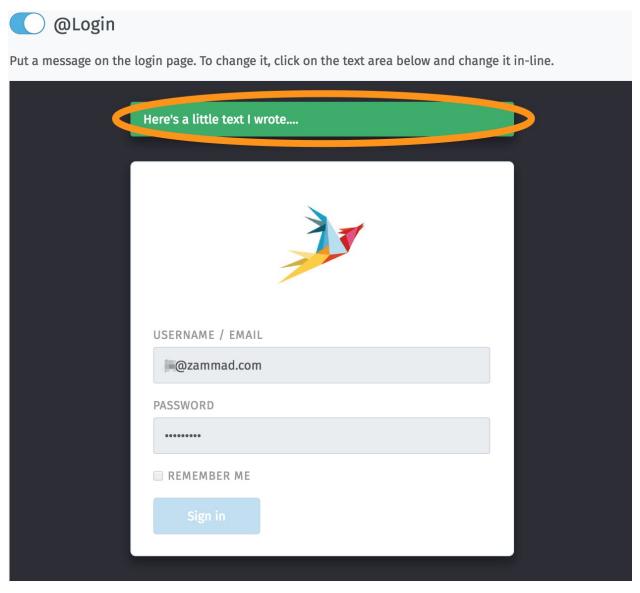
## 35.1 Mode

Enable or disable the maintenance mode of Zammad. If enabled, all non-administrators get logged out and only administrators can start a new session.

Before the maintenance mode is activated, you can not only inform about it on the login page...

### 35.2 @Login

You can place a short message for all users on the login page. This will then be displayed as follows:



But you can also inform all agents with a message about something:

#### Message

Send a message to all logged in users.

TITLE

Here's a little text I wrote

#### MESSAGE

you might want to read it note by note

□ Reload application

Send to clients

### Monitoring

Please note: This is only available in self hosted instances, as we're monitoring hosted instances and fix problems.

On the monitoring page you can see the current health state of Zammad. This can be useful if you for example have the feeling that you don't receive emails anymore, you can take a look here before logging onto your Server.

Besides the optical state of an event, you can also reset the access token for this module and get the monitoring URL for a monitoring system of your choice.

Example output to this can be:

Everything is OK (refer to image 2 for interface example):

Zammad has issue (whatever nature, refer to image 2 for interface example):

Monitoring
Current Token
Reset
Health Check
Health information can be retrieved as JSON using:
https:///api/v1/monitoring/health_check?token=
Current Status
<ul> <li>Channel: Twitter::Account in key:{"id"=&gt; , "screen_name"=&gt;" , "name"=&gt;" , "name"=&gt;" };</li> </ul>
Can't use stream for channel (42): # <json::parsererror: 'the="" 765:="" and="" at="" site="" streams="" td="" token="" unexpected="" user<=""></json::parsererror:>
Streams endpoints have been turned off. Please migrate to alternate APIs. See https://t.co/usss'> Failed to run background job #1 'BackgroundJobSearchIndex' & time(s) with 144 attempt(s).

Monitoring
Current Token
Reset
Health Check
Health information can be retrieved as JSON using:
https:// /api/v1/monitoring/health_check?token=
Current Status
no issues

## Packages

That's the package management-area.

Individual add-ons for Zammad can be installed and managed here.

# CHAPTER $\mathbf{38}$

## Sessions

Shows who logged on to the Zammad instance as a user, when and from where.

Version

Shows which version is currently being used on your Zammad-instance.

### **Composer Settings**

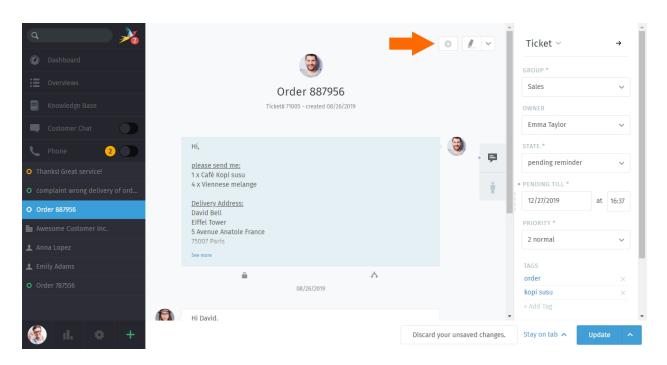


Fig. 1: Use the Composer Settings to change the behavior of the new message editor.

Note: These settings apply on all tickets and to all users across the entire system.

Note - default visibility (default: internal) This setting decides what the default visibility of note articles is. This affects only notes (default article on ticket answering). The visibility of phone- and Email article notes is not affected.



Enter Answer or select attachment...

Email - subject field (default: no) When setting this option to yes, Zammad will also display the subject field when answering via Email articles. It doesn't matter if you click on reply or switch to Email article manually.

Warning: Please note that if set to no, Zammad will automatically use the tickets title as subject!

The subject can differ between title and mail subject if choosing yes.

Email - full quote (default: no) Setting this option to yes will always add the content of the answered article as quotation below your signature.

**Note:** This does not affect the "mark and quote" functionality, if you mark a text with this setting enabled, we'll use the marked text as quote instead.

Email - quote header (default: yes) If you don't want Zammad to add the date, time and name or the article you're quoting, set this to no.

Example: On Thursday, June 27, 2019, 3:37:11 PM, Jacob Smith wrote:

Twitter - tweet initials (default: yes) When set to yes, this will add /CM (first character of first- and lastname) to the bottom of every tweet answer you create. This only affects tickets that come from the Twitter Channel.