



Zammad

Installation & Basics



Dornbirn, 3. April 2019

Zammad GmbH

Agenda

- What is Zammad
- Installation
- Working with the App
- Setting up Channels
- Working with the Team
- The Future

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- **What is Zammad**
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What is Zammad?

- Zammad is a Helpdesk / Support platform for satisfied customer service
- Open and fast – like your service should be
- Based on many years of experience with ticketing systems
 - „Zammad ist man stärker“
 - bavarian dialect for „together we are stronger“

Some numbers

- Initial release 18.10.2016
- Over 240.000 downloads (02.02.19)
- #1 Trending Open Source project in the Ruby category on GitHub
- First contribution just 5 hrs after initial release
- 223 pull requests (02.02.19)
- First Award after 4 weeks, second Award after 16 weeks

Key Features

- Native Web App – almost feels like a desktop app
- Super fast fulltext search, which also includes attachments
- Every resource can be reached via the included REST API by design
 - Users
 - Tickets
 - And many more
- Open Source

Ticketing – Core features

- AutoSave for tickets
- Easy data historization
- Escalationen
- Collision detection
- Custom overviews based upon ticket attributes
- Individual fields for tickets, customers, users
- Customer chat
- Custom text templates via shortcut
- Social network integration for Twitter and Facebook

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Installation – The easy way

- OS Packages for
 - CentOS/RHEL
 - Debian/Ubuntu
 - SLES
- Databases
 - PostgreSQL
 - MySQL/MariaDB
- Search Engines
 - elasticsearch

Installation – The easy way

■ Installation on CentOS

```
sudo yum install epel-release
```

```
sudo rpm --import https://rpm.packager.io/key
```

```
echo "[zammad] name=Repository for zammad/zammad application.  
baseurl=https://rpm.packager.io/gh/zammad/zammad/centos7/stable  
enabled=1" | sudo tee /etc/yum.repos.d/zammad.repo
```

```
sudo yum install zammad
```

Installation – The easy way

■ Configuration of elasticsearch

```
rpm --import https://artifacts.elastic.co/GPG-KEY-elasticsearch
echo "[elasticsearch-5.x] name=Elasticsearch repository for 5.x
packages baseurl=https://artifacts.elastic.co/packages/5.x/yum
gpgcheck=1 gpgkey=https://artifacts.elastic.co/GPG-KEY-elasticsearch
enabled=1 autorefresh=1 type=rpm-md" | sudo tee
/etc/yum.repos.d/elasticsearch-5.x.repo

sudo yum install java-1.8.0-openjdk elasticsearch

sudo /usr/share/elasticsearch/bin/elasticsearch-plugin install
mapper-attachments

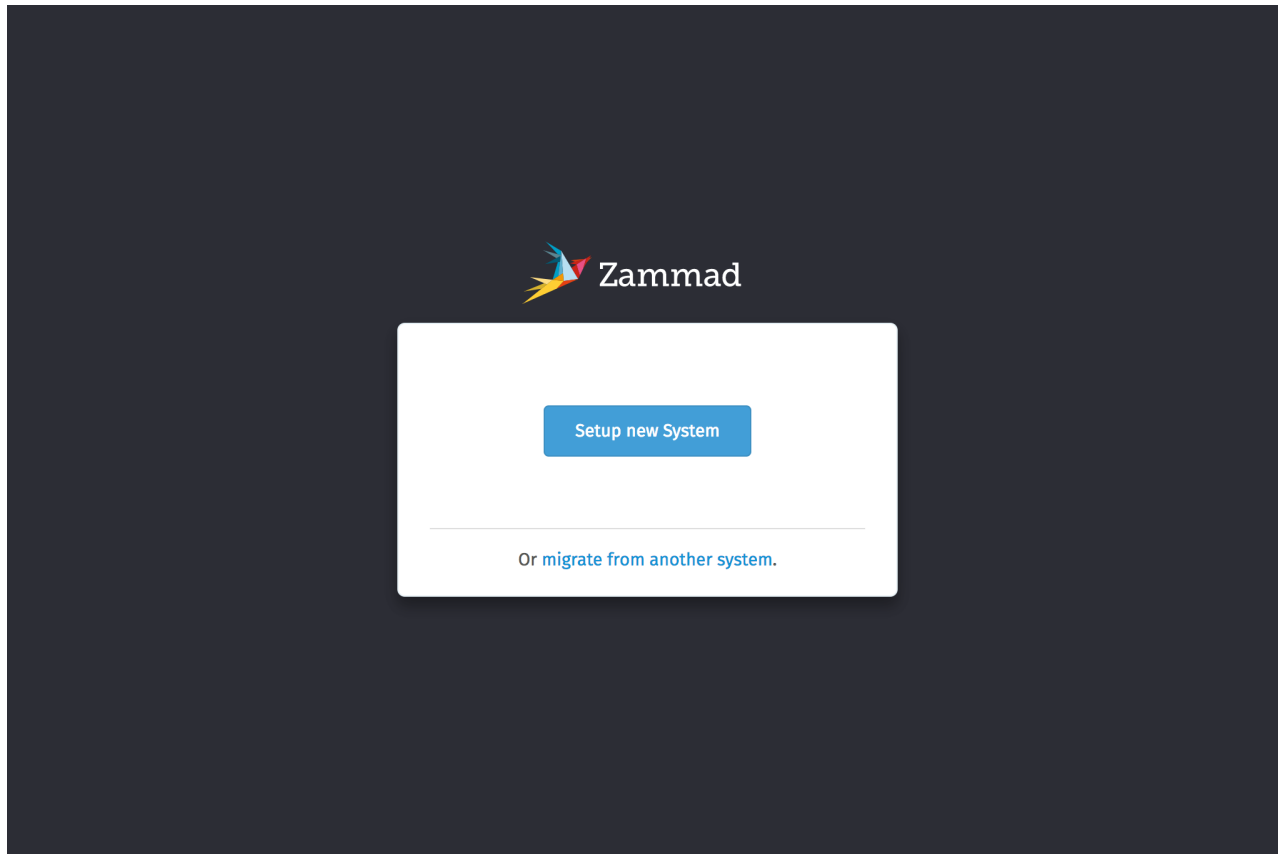
systemctl start elasticsearch

systemctl enable elasticsearch

zammad run rails r "Setting.set('es_url', 'http://127.0.0.1:9200')"
```

Installation – The easy way

- Done. Start configuration.



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App - Structure

The screenshot displays the Zammad web application interface. On the left is a dark sidebar with a search bar, navigation links (Dashboard, Overviews), a list of recent tickets, and a list of users (Anna Lopez, Emily Adams). The main content area shows the details for 'Order 887956', including a customer profile picture, the order number, and the ticket creation date (07/05/2016). A message from the customer is shown in a light blue bubble, requesting coffee and providing a delivery address. A response from the support agent is shown in a white bubble, confirming the shipping address. On the right, a 'Ticket' sidebar contains dropdown menus for Group (Sales), Owner (Emma Taylor), State (pending reminder), and Priority (2 normal). It also shows a 'PENDING TILL' date and time, tags (order, kopi susu), and links. At the bottom right, there is a 'Discard your unsaved changes.' warning, a 'Stay on tab' button, and an 'Update' button.

Order 887956
Ticket# 80005 - created 07/05/2016

Hi,

please send me:
1 x Café Kopi susu
4 x Viennese melange

Delivery Address:
David Bell
Eiffel Tower
5 Avenue Anatole France
75007 Paris
[See more](#)

07/05/2016

Hi David,

nice, we will ship it to your delivery address:

Eiffel Tower 5 Avenue Anatole France 75007 Paris.

Ticket ▾ →

GROUP *
Sales ▾

OWNER
Emma Taylor ▾

STATE *
pending reminder ▾

PENDING TILL *
11/06/2016 at 07:33

PRIORITY *
2 normal ▾

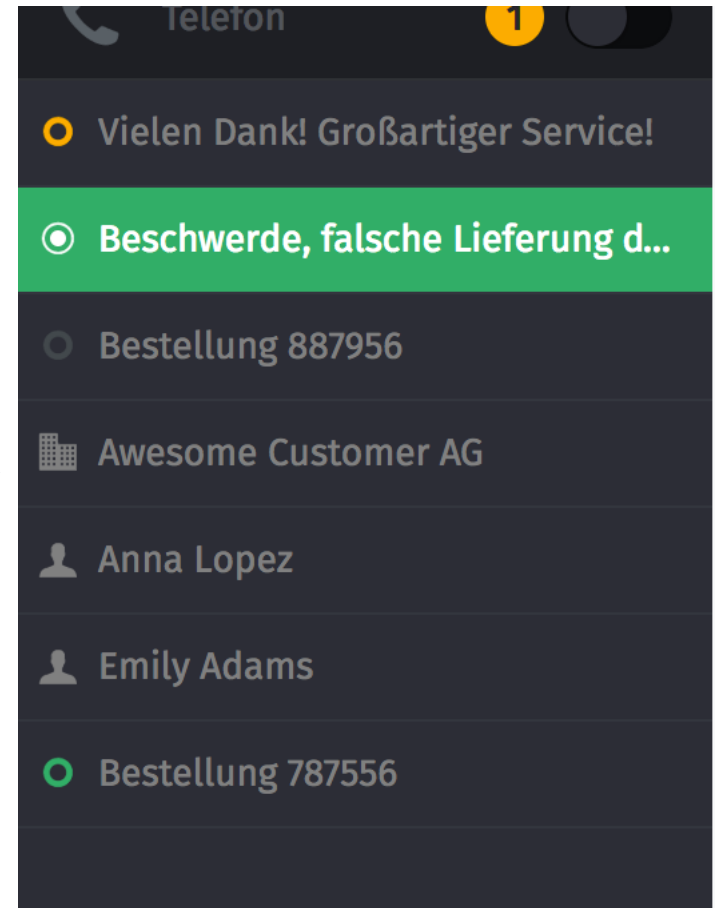
TAGS
order ×
kopi susu ×
[+ Add Tag](#)

LINKS
[+ Add Link](#)

Discard your unsaved changes. Stay on tab [^](#) [Update](#) [^](#)

App - Tabs

- Open multiple tabs at same time
- Reorder like you want
- Unsaved changes saved on server
- Pulsing icon on changes
- Push changes immediately to client
- Ring traffic lights



App - Ring traffic lights



App - Ring traffic lights



ticket is new/open or
pending reminder of ticket has reached

somebody need to work on it

App - Ring traffic lights



pending reminder or pending close is set
but not reached till now

no further action/attention needed right now

App - Ring traffic lights



ticket is escalated

**somebody need to work immediately on this ticket
(to cancel escalation)**

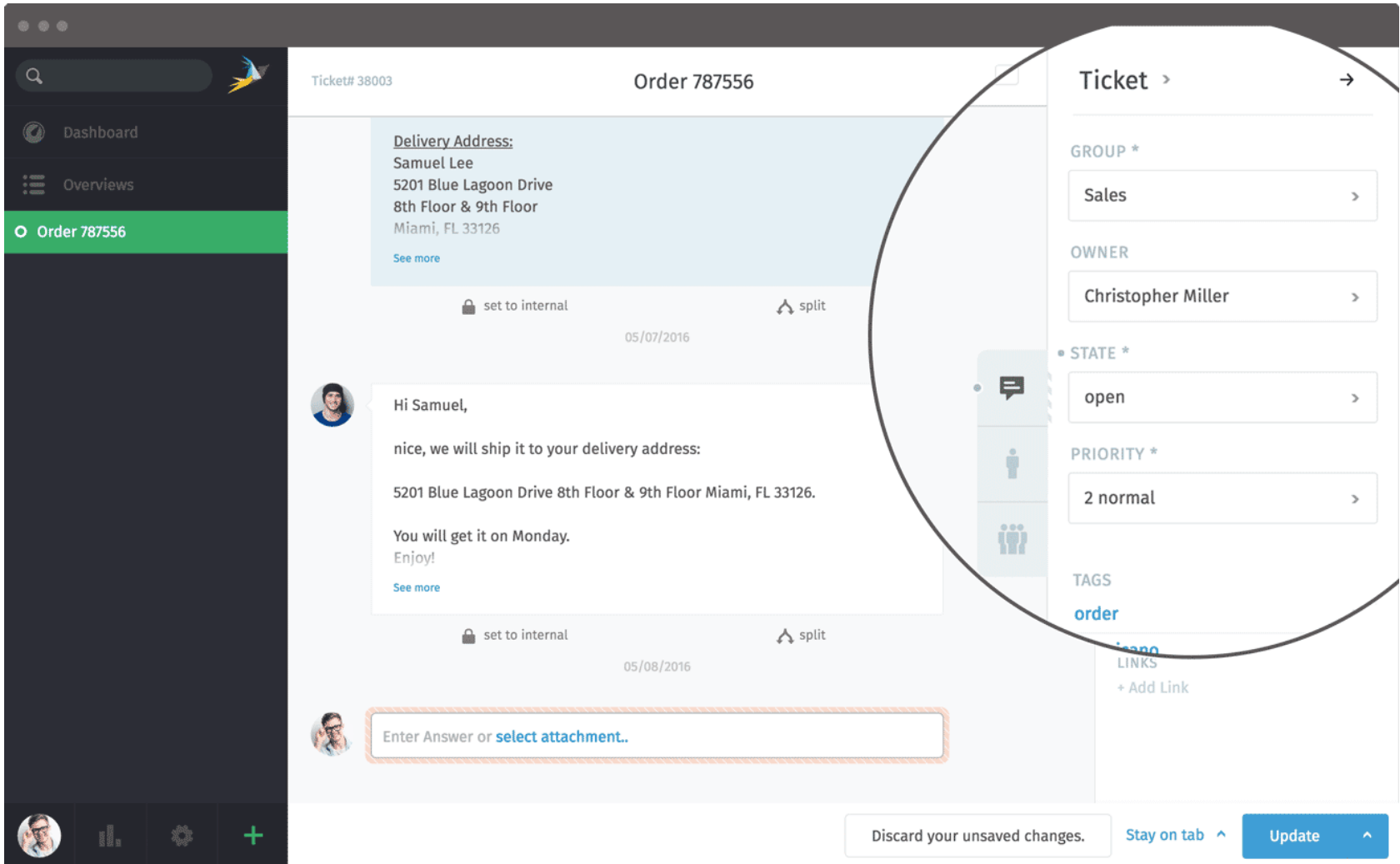
App - Ring traffic lights



ticket is closed

no further action/attention needed

App – Ticket in detail



Ticket# 38003 **Order 787556**

Delivery Address:
 Samuel Lee
 5201 Blue Lagoon Drive
 8th Floor & 9th Floor
 Miami, FL 33126
[See more](#)

set to internal split 05/07/2016

 Hi Samuel,
 nice, we will ship it to your delivery address:
 5201 Blue Lagoon Drive 8th Floor & 9th Floor Miami, FL 33126.
 You will get it on Monday.
 Enjoy!
[See more](#)

set to internal split 05/08/2016

 Enter Answer or [select attachment..](#)

Ticket >

GROUP *
 Sales >

OWNER
 Christopher Miller >

STATE *
 open >

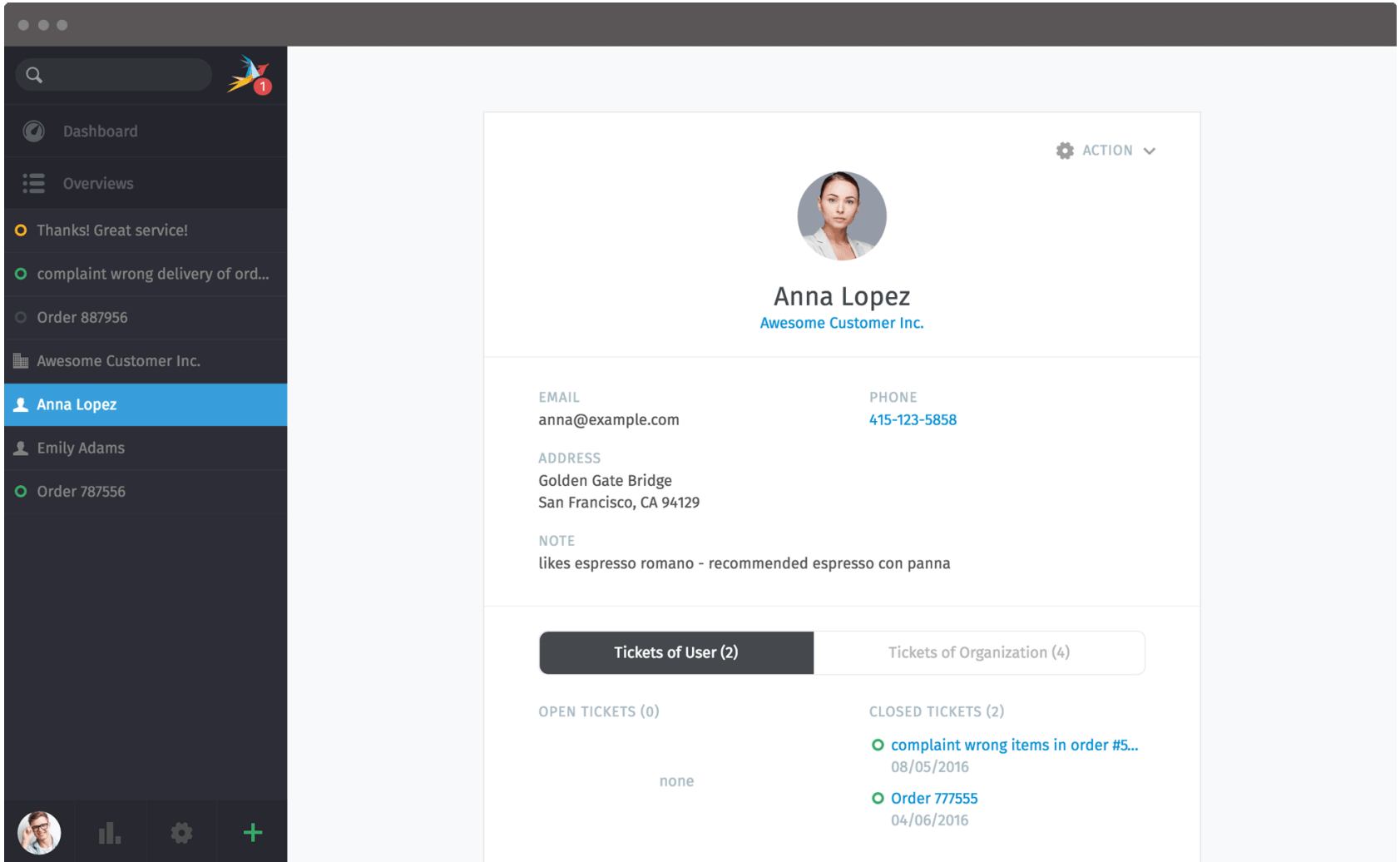
PRIORITY *
 2 normal >

TAGS
 order

LINKS
 + Add Link

Discard your unsaved changes. Stay on tab ^ Update ^

App – Customer in detail



The screenshot displays the Zammad application interface. On the left is a dark sidebar with a search bar, navigation links (Dashboard, Overviews), and a list of recent items including a thank-you message, a complaint, and two orders. The main content area shows the detailed profile of 'Anna Lopez' from 'Awesome Customer Inc.', including her profile picture, contact information (email, phone, address), and a note. Below this, there are tabs for 'Tickets of User (2)' and 'Tickets of Organization (4)'. The 'Tickets of User' tab is active, showing 'OPEN TICKETS (0)' with 'none' listed. The 'Tickets of Organization' tab shows 'CLOSED TICKETS (2)' with two entries: a complaint and an order, both dated in 2016.

Customer Profile: Anna Lopez
 Awesome Customer Inc.

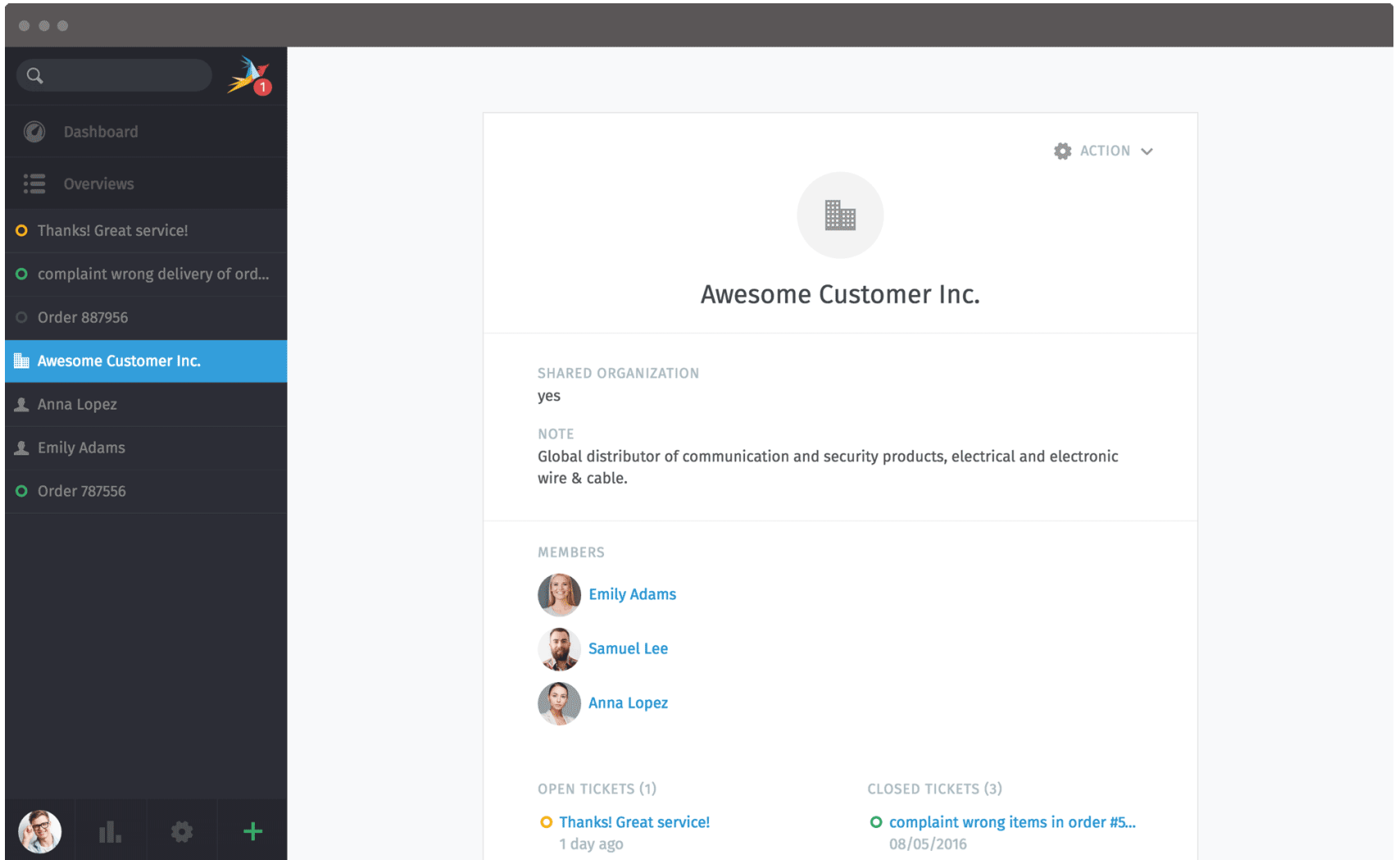
CONTACT INFORMATION:
 EMAIL: anna@example.com
 PHONE: 415-123-5858
 ADDRESS: Golden Gate Bridge, San Francisco, CA 94129

NOTE:
 likes espresso romano - recommended espresso con panna

Tickets Summary:

Tickets of User (2)	Tickets of Organization (4)
OPEN TICKETS (0) none	CLOSED TICKETS (2) - complaint wrong items in order #5... 08/05/2016 - Order 777555 04/06/2016

App – Organization in detail

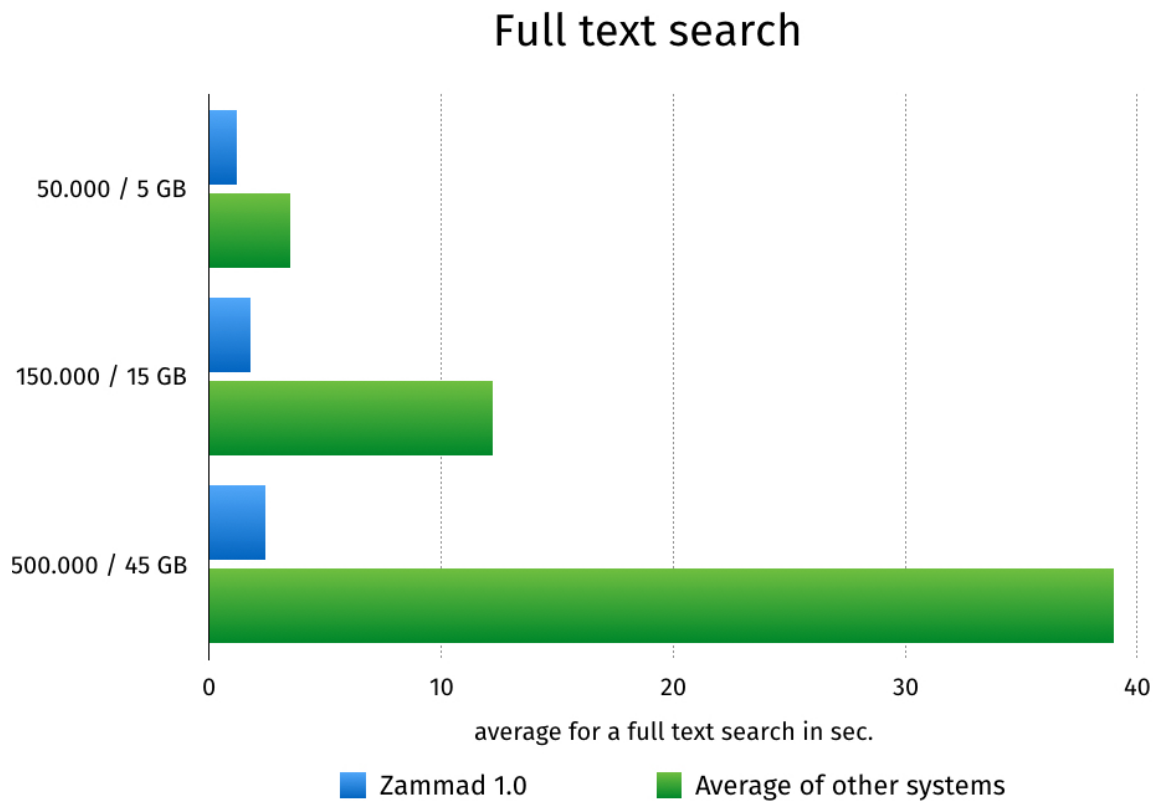


The screenshot displays the Zammad mobile application interface. On the left is a dark sidebar with a search bar at the top, followed by navigation options: 'Dashboard', 'Overviews', and a list of recent items including 'Thanks! Great service!', 'complaint wrong delivery of ord...', and 'Order 887956'. The 'Awesome Customer Inc.' entry is highlighted in blue. Below this are user entries for 'Anna Lopez' and 'Emily Adams', and another order 'Order 787556'. At the bottom of the sidebar are icons for a profile, a bar chart, settings, and a plus sign.

The main content area shows the details for 'Awesome Customer Inc.', which has a building icon and an 'ACTION' dropdown menu. The details are organized into sections:

- SHARED ORGANIZATION**: A toggle switch labeled 'yes'.
- NOTE**: A text block stating 'Global distributor of communication and security products, electrical and electronic wire & cable.'
- MEMBERS**: A list of three members with circular profile pictures: 'Emily Adams', 'Samuel Lee', and 'Anna Lopez'.
- TICKETS**: Two columns showing ticket status. The 'OPEN TICKETS (1)' column contains 'Thanks! Great service!' with a timestamp of '1 day ago'. The 'CLOSED TICKETS (3)' column contains 'complaint wrong items in order #5...' with a timestamp of '08/05/2016'.

App – Fulltext search



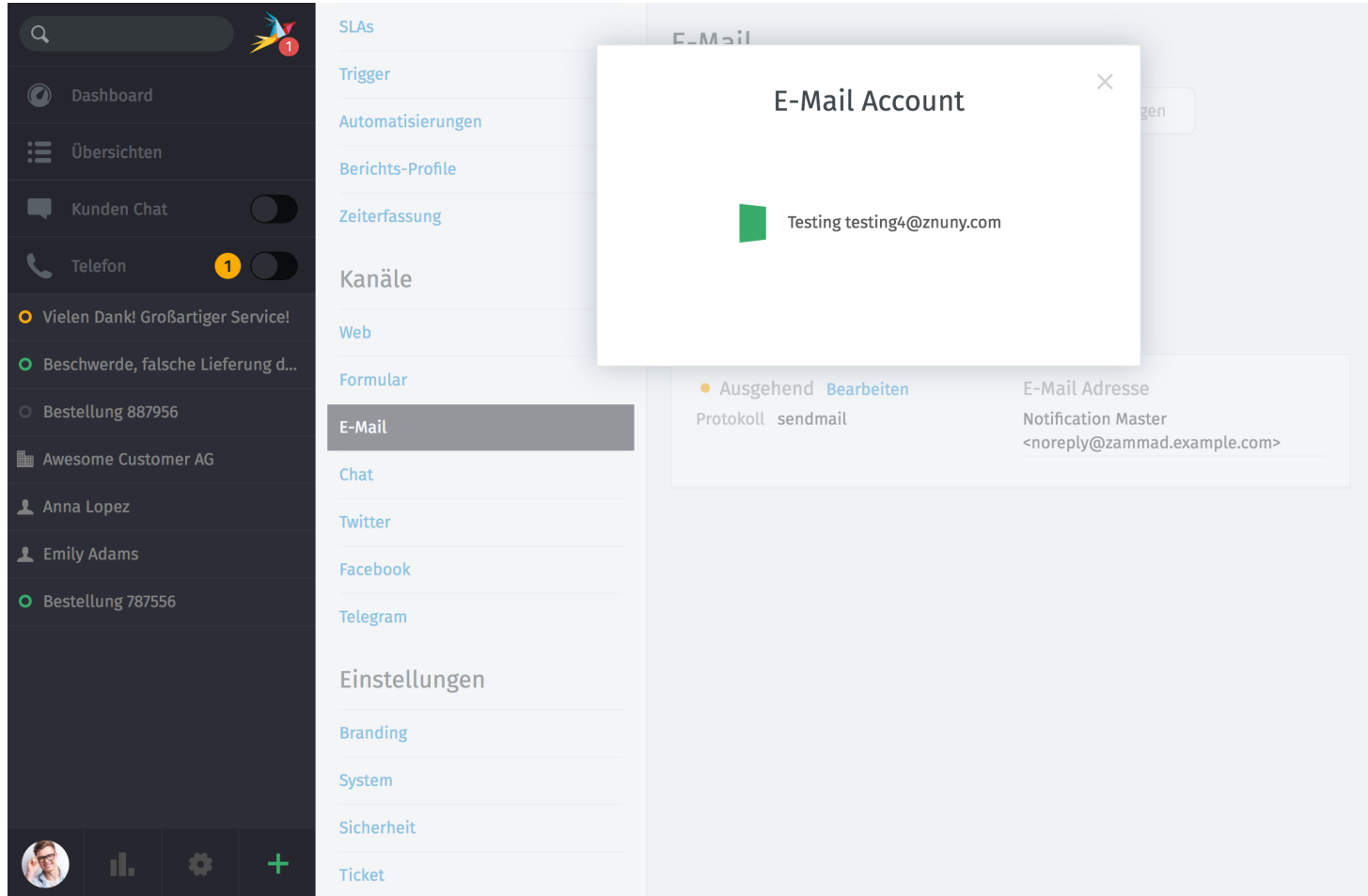
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Channel – Email

- Autodiscovery
- IMAP(S)/POP3(S)/SMTP(S)

Channel – Email



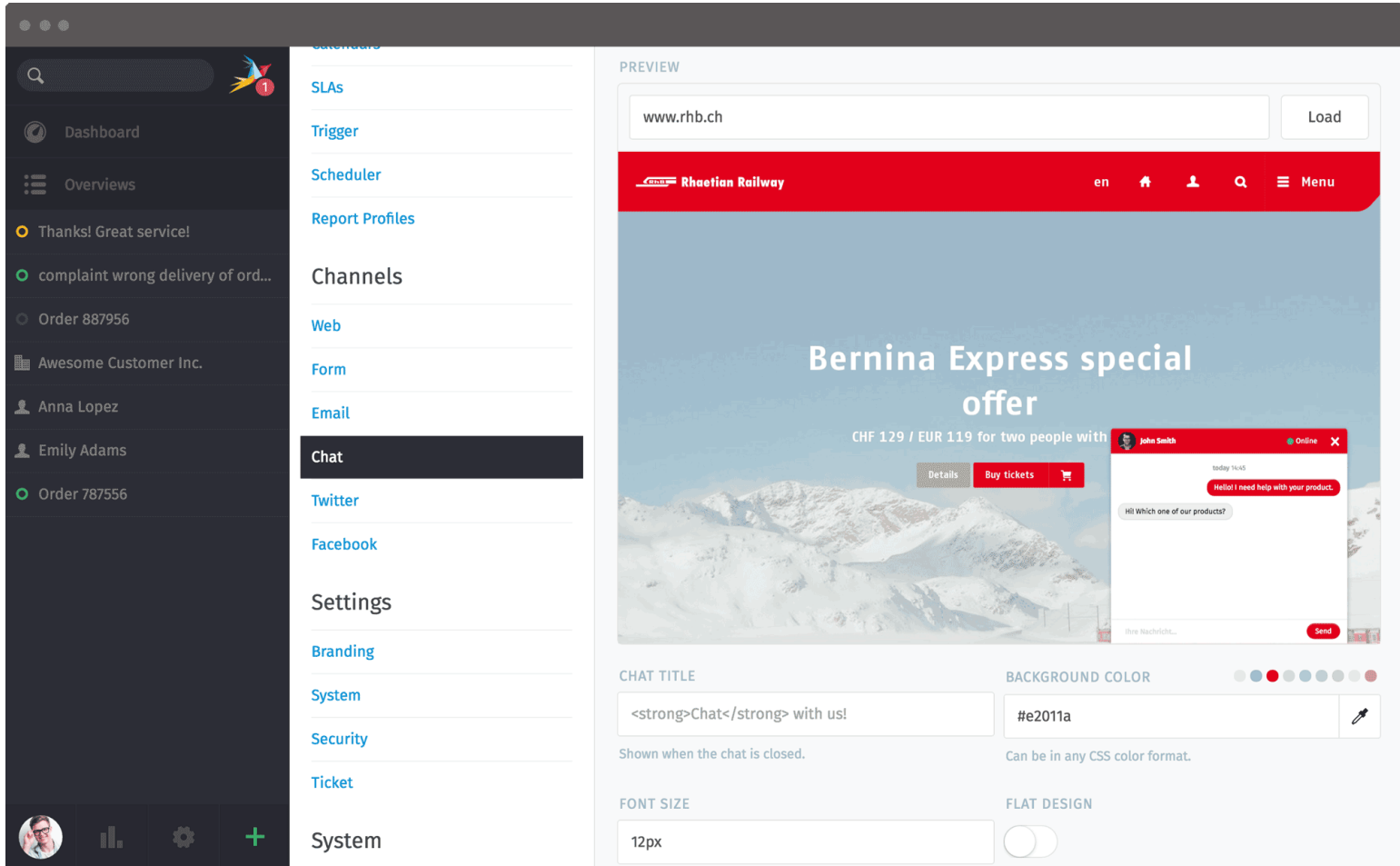
The screenshot displays the Zammad web interface. On the left is a dark sidebar with navigation links: Dashboard, Übersichten, Kunden Chat, Telefon, and a list of recent messages. The main area on the right shows a sidebar menu with categories like SLAs, Trigger, Automatisierungen, Berichts-Profil, Zeiterfassung, Kanäle, Web, Formular, E-Mail (selected), Chat, Twitter, Facebook, Telegram, Einstellungen, Branding, System, Sicherheit, and Ticket. The 'E-Mail' section is active, showing a table of email accounts. A modal window titled 'E-Mail Account' is overlaid, showing a green square icon and the email address 'Testing testing4@znuny.com'. Below the modal, the table shows one account with status 'Ausgehend', action 'Bearbeiten', and email address 'Notification Master <noreply@zammad.example.com>'.

Status	Action	E-Mail Adresse
Ausgehend	Bearbeiten	Notification Master <noreply@zammad.example.com>

Channel – Chat

- Java Script snipped
- No “Leave a message”
- No “Long wait times”
- Foreign Body Chat Module - Auto design

Channel – Chat



The screenshot displays the Zammad web interface for configuring the Chat channel. The left sidebar contains navigation links: Dashboard, Overviews, a list of recent messages (e.g., "Thanks! Great service!", "complaint wrong delivery of ord..."), and a list of users (e.g., "Anna Lopez", "Emily Adams"). The main content area is divided into two columns. The left column lists various configuration options: SLAs, Trigger, Scheduler, Report Profiles, Channels, Web, Form, Email, Chat (selected), Twitter, Facebook, Settings, Branding, System, Security, Ticket, and System. The right column shows a PREVIEW of the chat interface on the website www.rhb.ch. The preview includes a red header with the Rhaetian Railway logo and navigation links. The main content area features a large image of a snowy mountain range with the text "Bernina Express special offer" and "CHF 129 / EUR 119 for two people with". A chat window is overlaid on the right side of the preview, showing a conversation with "John Smith" who is online. The chat window has a red header with the user's name and status, and a white body with a message: "Hello! I need help with your product." and a response: "Hi! Which one of our products?". Below the preview, there are configuration options for the chat title, background color, font size, and flat design toggle.

PREVIEW

www.rhb.ch Load

Rhaetian Railway en Home User Search Menu

Bernina Express special offer

CHF 129 / EUR 119 for two people with

Details Buy tickets

John Smith Online X

Today 14:45

Hello! I need help with your product.

Hi! Which one of our products?

Three Nachrichten... Send

CHAT TITLE

Chat with us!

Shown when the chat is closed.

BACKGROUND COLOR

#e2011a

Can be in any CSS color format.

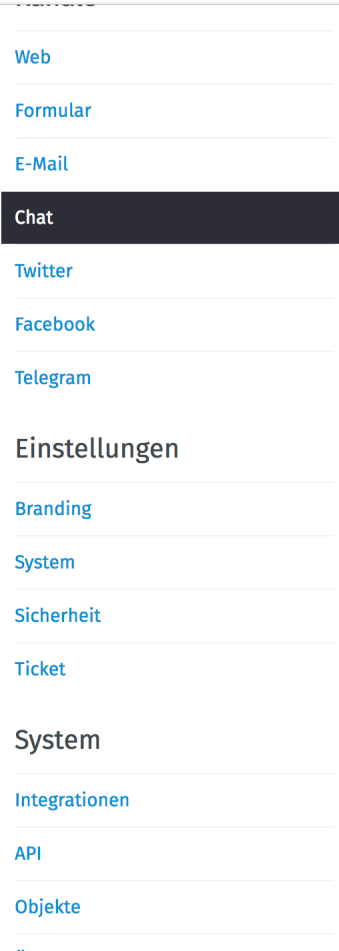
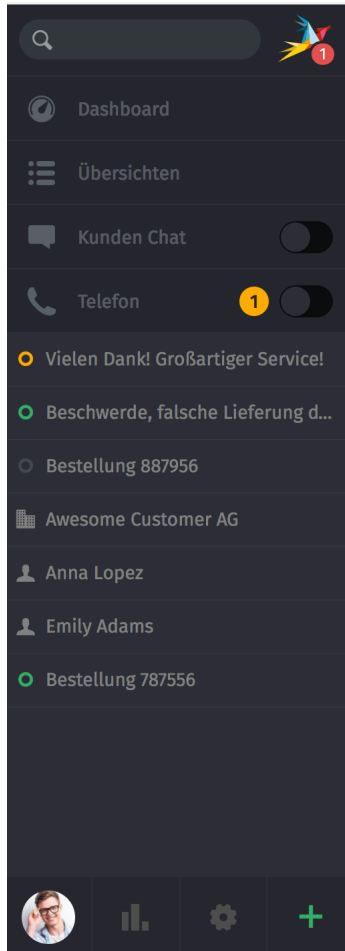
FONT SIZE

12px

FLAT DESIGN

☐

Channel – Chat



Füge den Widget-Code in Deine Webseite ein, danach sollte der Chat auf der Webseite angezeigt werden. Der Widget-Code sollte am Ende des Quellcodes, vor dem schließenden `</body>` Tag eingefügt werden.

Voraussetzung

Zammad Chat benötigt jQuery. Wenn Du dies bisher nicht auf Deiner Seite verwendest, kannst Du es mit folgender Zeile einbinden.

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

Automatische Chat-Ansicht (default)

Der Chat wird angezeigt sobald eine Verbindung zu Zammad hergestellt werden konnte und ein Agent auf online steht.

```
<script src="http://localhost:3000/assets/chat/chat.min.js"></script>
<script>
$(function() {
  new ZammadChat({
    fontSize: '12px',
    chatId: 1
  });
});
</script>
```

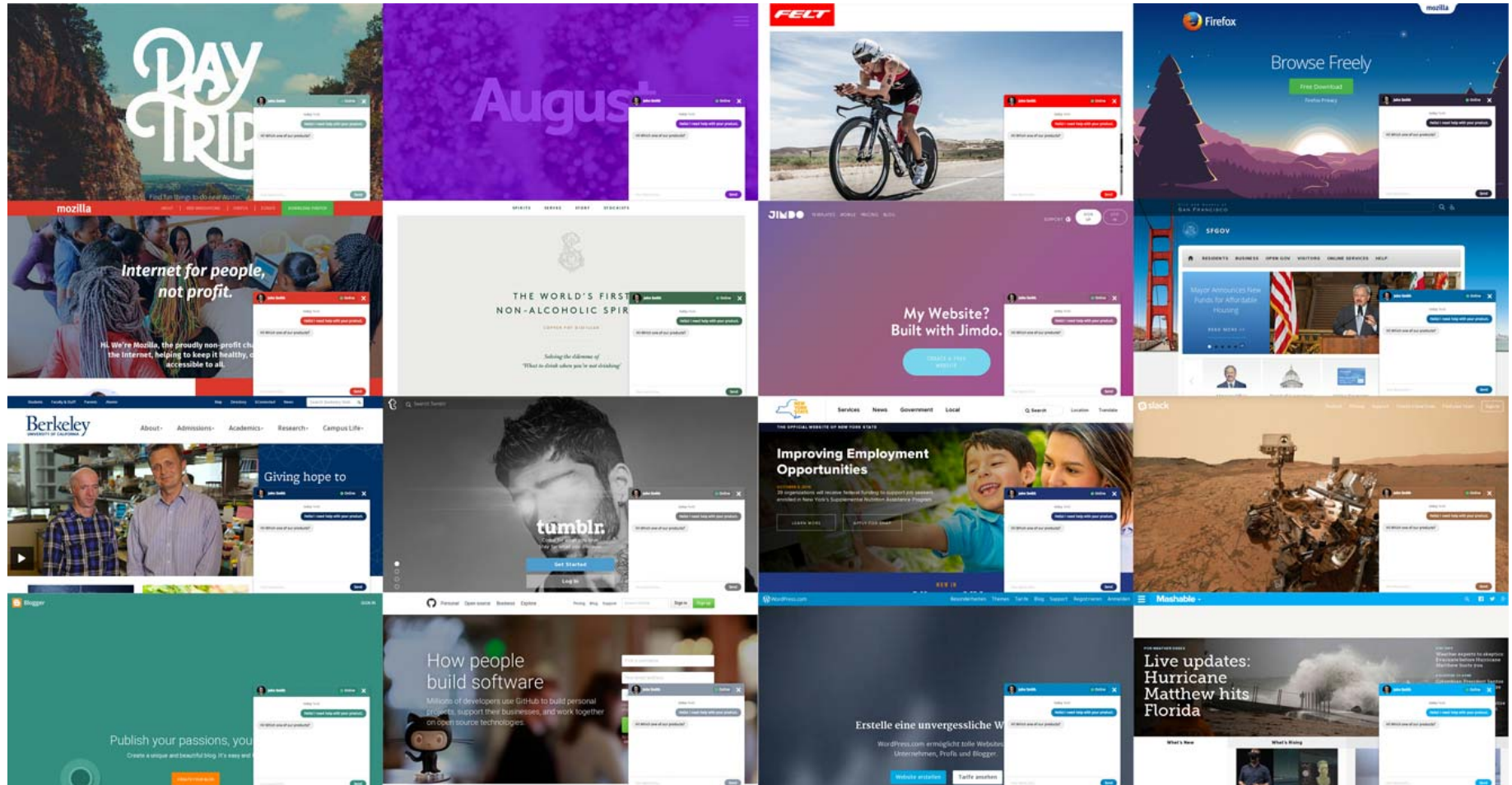
Manuelles öffnen des Chat

Wenn Du den Chat über einen Klick öffnen lassen möchtest, dann muss die Option `show` auf `false` stehen und die Class `open-zammad-chat` den Knopf hinzugefügt werden.

```
<button class="open-zammad-chat">Chat with us</button>

<script src="http://localhost:3000/assets/chat/chat.min.js"></script>
<script>
$(function() {
  new ZammadChat({
```

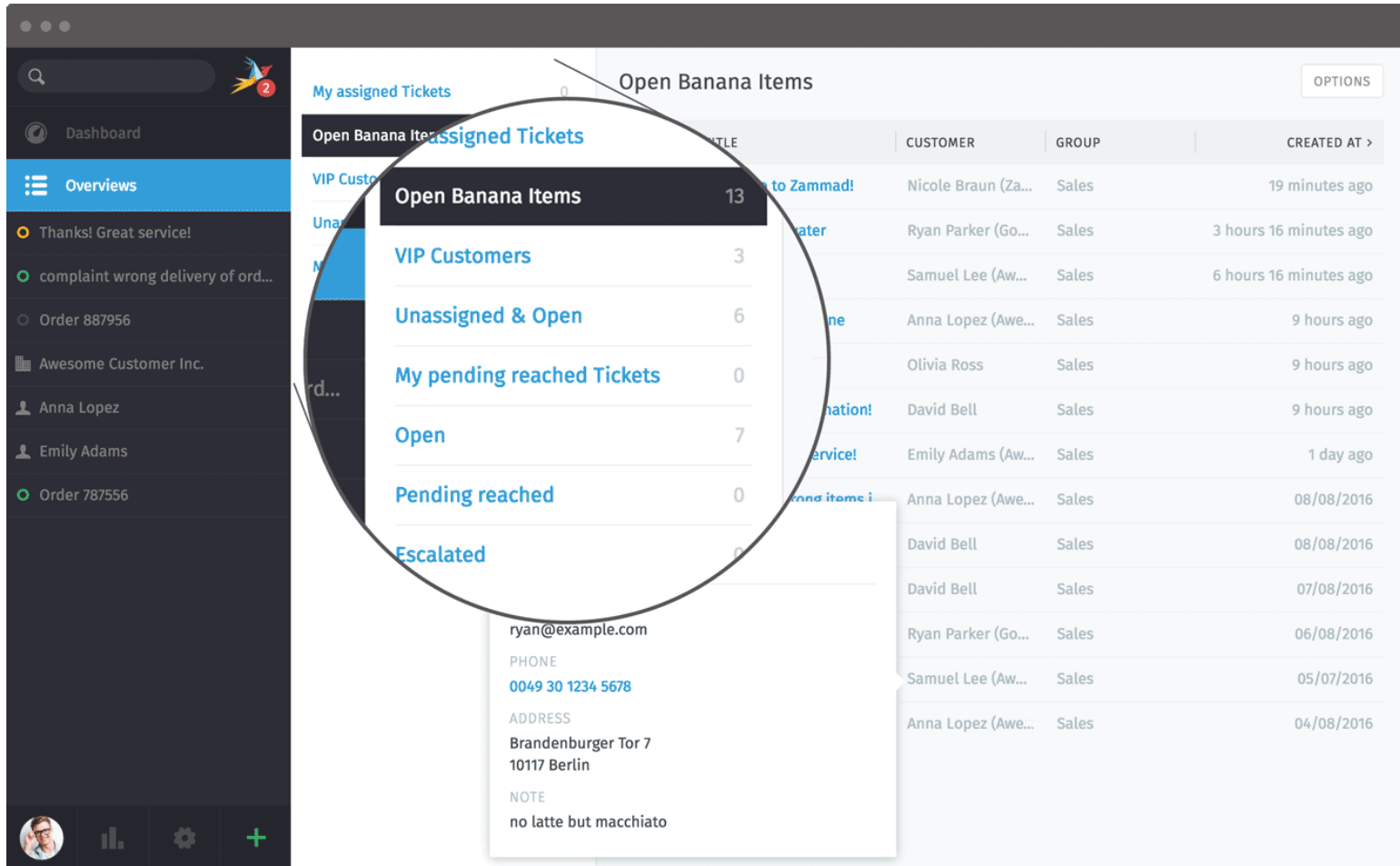
Channel – Chat



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Working in Team – Overviews



The screenshot displays the Zammad web interface. On the left is a dark sidebar with navigation links: Dashboard, Overviews, and a list of recent tickets and customers. The main content area is titled 'Open Banana Items' and features a table of tickets. A circular callout highlights a filter menu for 'Open Banana Items' with the following options and counts:

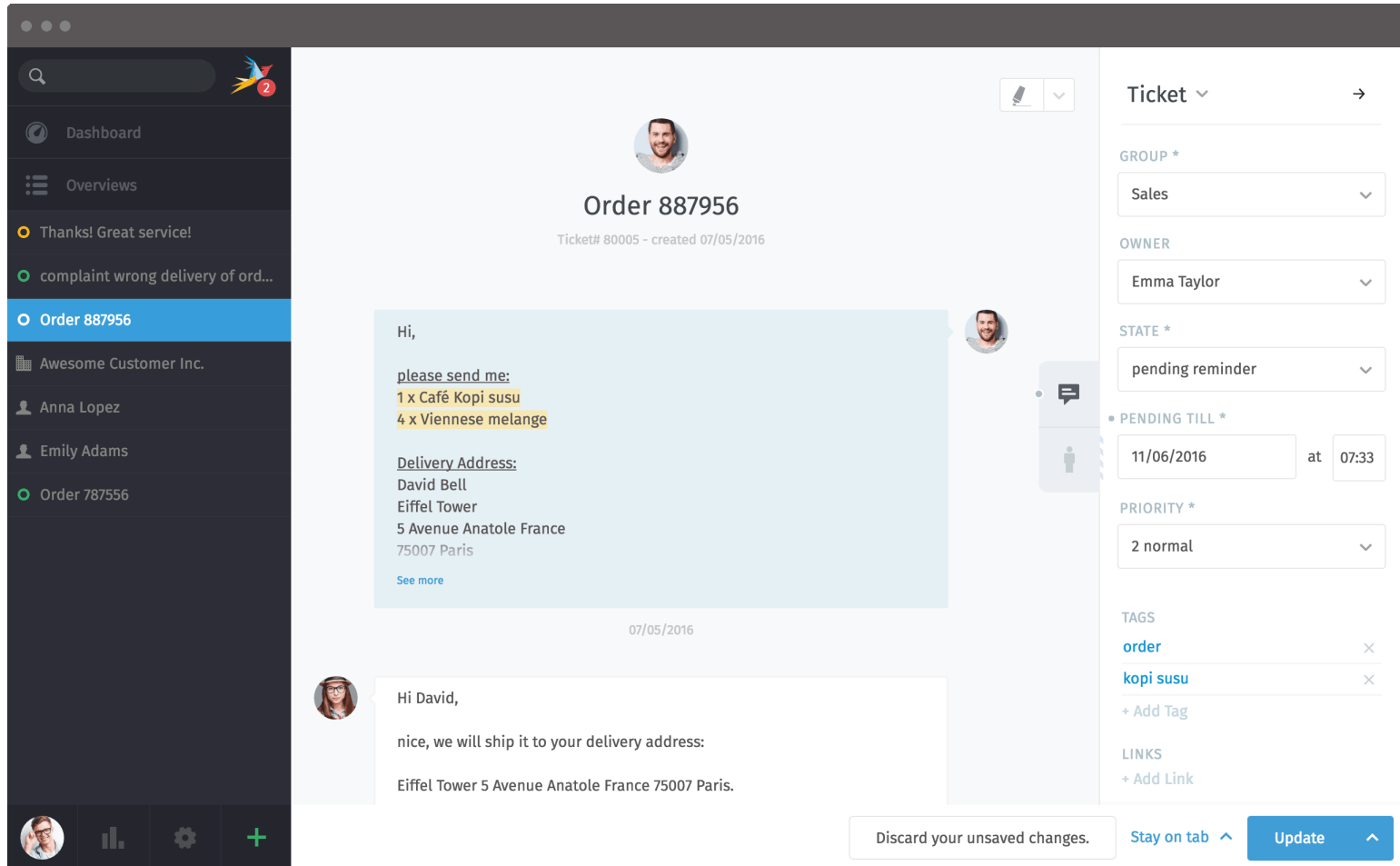
- Open Banana Items: 13
- VIP Customers: 3
- Unassigned & Open: 6
- My pending reached Tickets: 0
- Open: 7
- Pending reached: 0
- Escalated: 0

Below the callout, a customer profile for 'ryan@example.com' is shown with the following details:

- PHONE: 0049 30 1234 5678
- ADDRESS: Brandenburger Tor 7, 10117 Berlin
- NOTE: no latte but macchiato

The main table of tickets has the following columns: TITLE, CUSTOMER, GROUP, and CREATED AT. It lists several tickets, including one from Nicole Braun (Za...) and another from Ryan Parker (Go...).

Working in Team – Permanent markup



The screenshot displays the Zammad web interface for managing a ticket. The sidebar on the left contains navigation links: Dashboard, Overviews, and a list of recent tickets including 'Thanks! Great service!', 'complaint wrong delivery of ord...', and the selected 'Order 887956'. Below these are links for 'Awesome Customer Inc.', 'Anna Lopez', 'Emily Adams', and 'Order 787556'. The main chat area shows a conversation with a customer. The customer's message, dated 07/05/2016, includes a request for items and a delivery address. The agent's response, dated 07/05/2016, confirms the shipping to the provided address. The right-hand panel displays ticket details: Ticket # 80005, created on 07/05/2016. The ticket is assigned to the 'Sales' group, owned by 'Emma Taylor', and is in the 'pending reminder' state. It has a 'PENDING TILL' date of 11/06/2016 at 07:33 and a 'PRIORITY' of '2 normal'. The ticket is tagged with 'order' and 'kopi susu'. At the bottom right, there is a button to 'Update' the ticket and a warning to 'Discard your unsaved changes.'.

Order 887956
Ticket# 80005 - created 07/05/2016

Hi,

please send me:
1 x Café Kopi susu
4 x Viennese melange

Delivery Address:
David Bell
Eiffel Tower
5 Avenue Anatole France
75007 Paris
[See more](#)

07/05/2016

Hi David,

nice, we will ship it to your delivery address:
Eiffel Tower 5 Avenue Anatole France 75007 Paris.

Ticket →

GROUP *
Sales

OWNER
Emma Taylor

STATE *
pending reminder

PENDING TILL *
11/06/2016 at 07:33

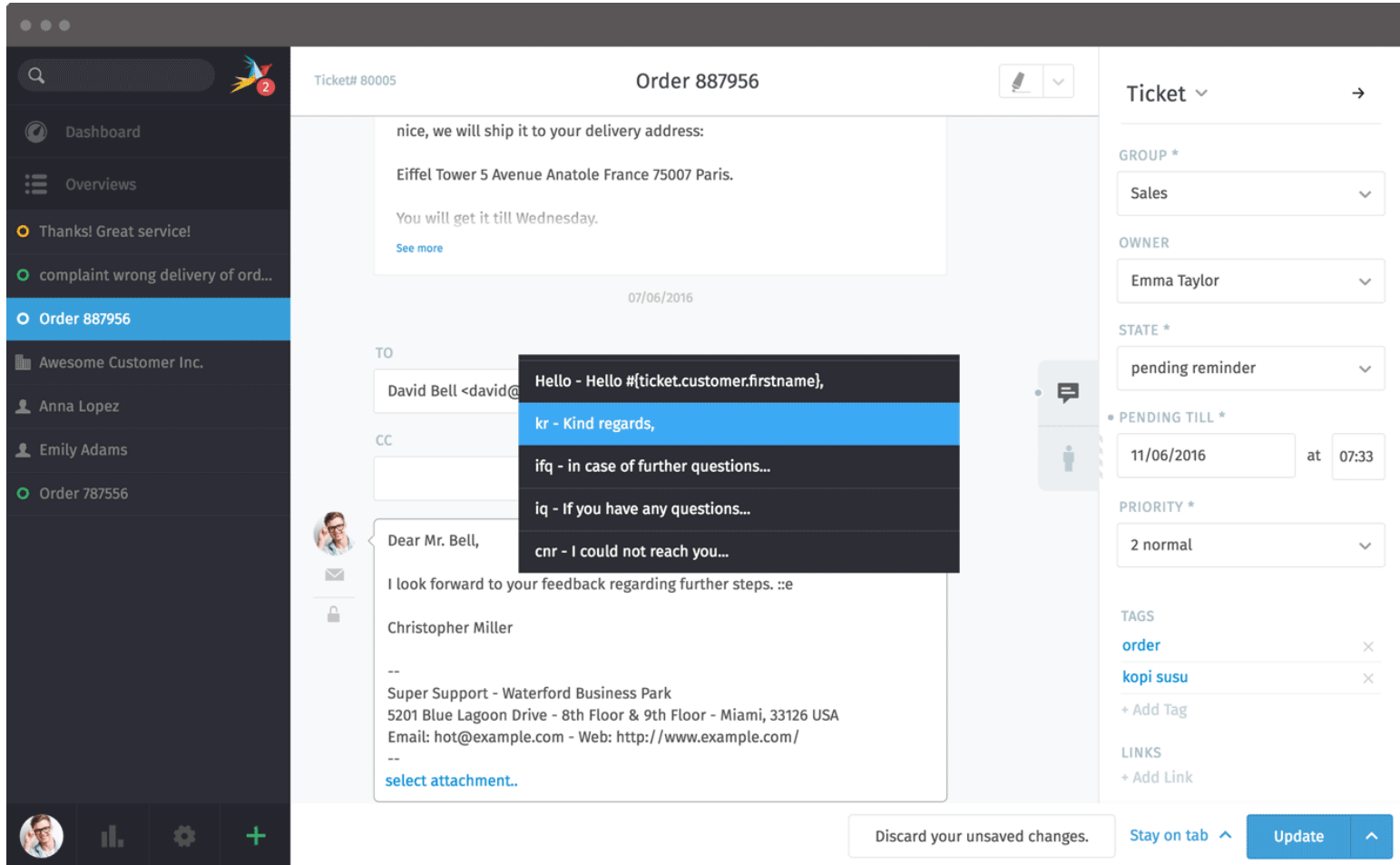
PRIORITY *
2 normal

TAGS
order
kopi susu
+ Add Tag

LINKS
+ Add Link

Discard your unsaved changes. Stay on tab Update

Working in Team – ::Text modules



Order 887956

Ticket# 80005

nice, we will ship it to your delivery address:
Eiffel Tower 5 Avenue Anatole France 75007 Paris.
You will get it till Wednesday.
[See more](#)

07/06/2016

TO
David Bell <david@...>

CC
[Empty]

Dear Mr. Bell,

I look forward to your feedback regarding further steps. ::e

Christopher Miller

--
Super Support - Waterford Business Park
5201 Blue Lagoon Drive - 8th Floor & 9th Floor - Miami, 33126 USA
Email: hot@example.com - Web: http://www.example.com/
--
[select attachment..](#)

Dropdown Menu:

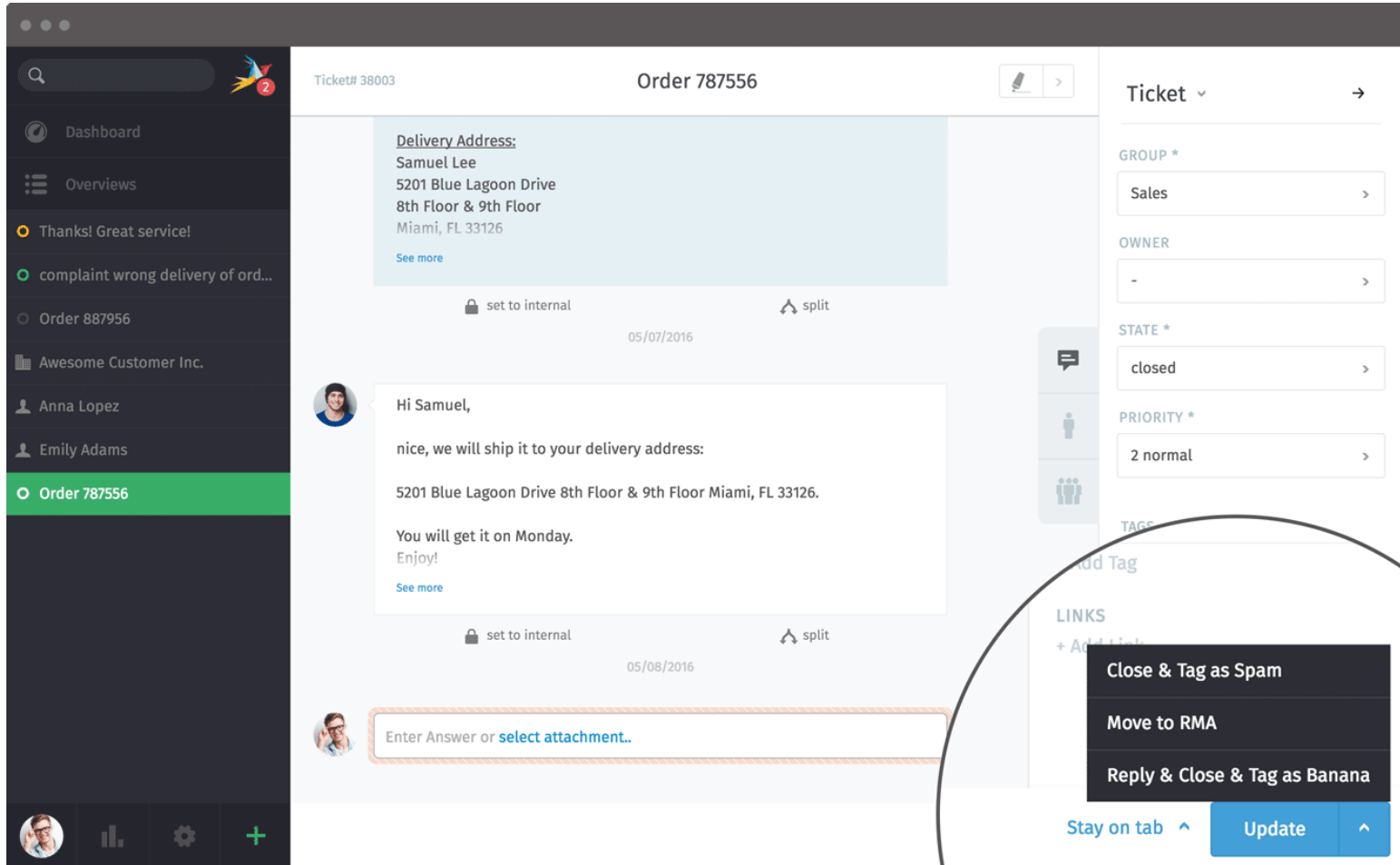
- Hello - Hello #{ticket.customer.firstname},
- kr - Kind regards,
- ifq - in case of further questions...
- iq - If you have any questions...
- cnr - I could not reach you...

Ticket Details:

- Ticket: [Ticket](#)
- GROUP *: Sales
- OWNER: Emma Taylor
- STATE *: pending reminder
- PENDING TILL *: 11/06/2016 at 07:33
- PRIORITY *: 2 normal
- TAGS: order, kopi susu
- LINKS: Add Link

Discard your unsaved changes. Stay on tab Update

Working in Team – Macros: automatic action sequences



The screenshot displays the Zammad ticket management interface. On the left is a sidebar with navigation options: Dashboard, Overviews, and a list of tickets. The ticket 'Order 787556' is selected and highlighted in green. The main area shows the ticket details for 'Ticket# 38003' and 'Order 787556'. It includes a delivery address for Samuel Lee and a message history. A macro dropdown menu is open, showing options: 'Close & Tag as Spam', 'Move to RMA', and 'Reply & Close & Tag as Banana'. The bottom right of the interface has buttons for 'Stay on tab', 'Update', and a refresh icon.

Ticket# 38003 **Order 787556**

Delivery Address:
 Samuel Lee
 5201 Blue Lagoon Drive
 8th Floor & 9th Floor
 Miami, FL 33126
[See more](#)

set to internal split 05/07/2016

Hi Samuel,
 nice, we will ship it to your delivery address:
 5201 Blue Lagoon Drive 8th Floor & 9th Floor Miami, FL 33126.
 You will get it on Monday.
 Enjoy!
[See more](#)

set to internal split 05/08/2016

Enter Answer or [select attachment..](#)

Ticket **GROUP *** Sales **OWNER** - **STATE *** closed **PRIORITY *** 2 normal

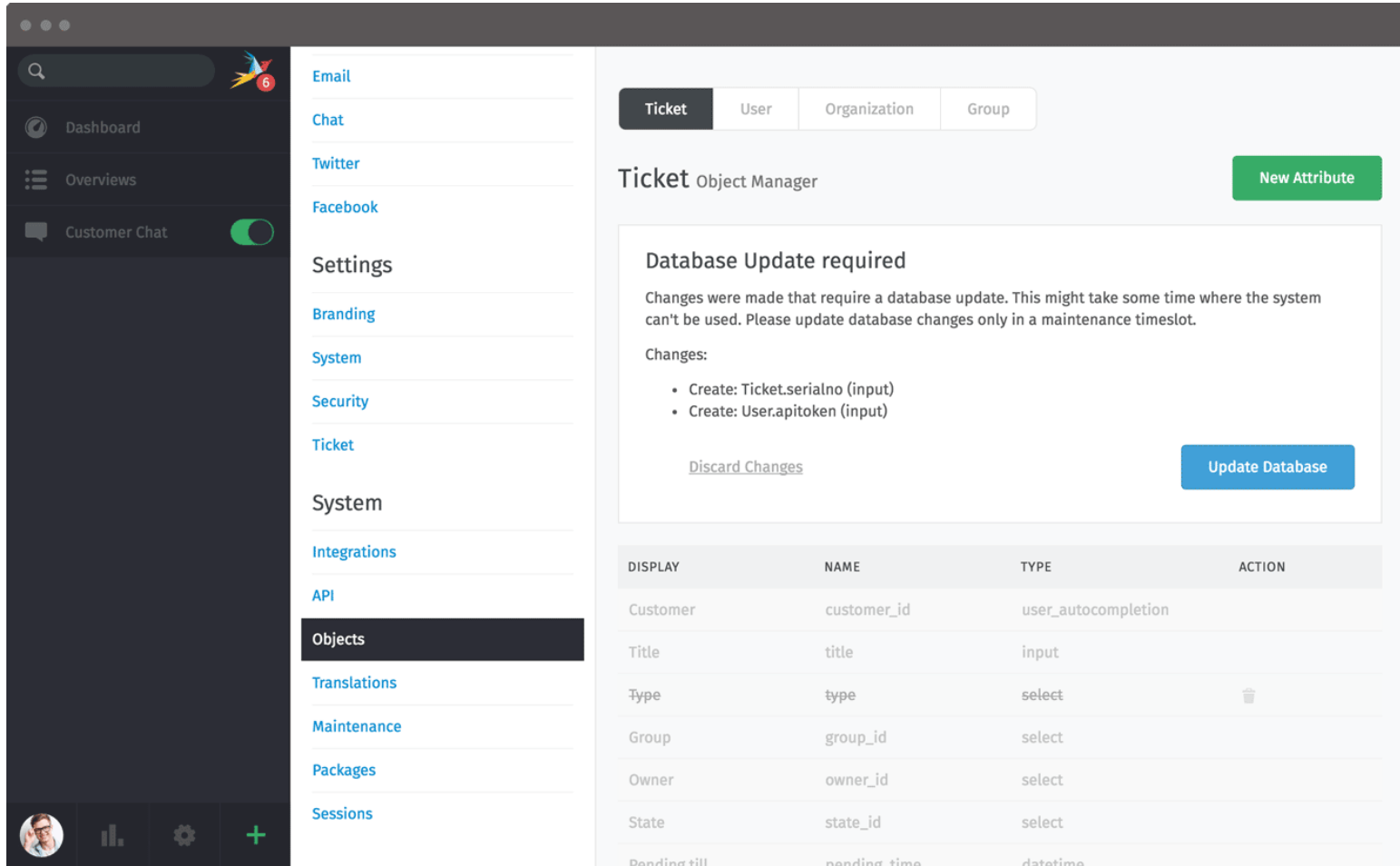
TAGS Add Tag

LINKS + Add Link

Close & Tag as Spam
 Move to RMA
 Reply & Close & Tag as Banana

Stay on tab ^ Update ^

Working in Team – Individual fields



The screenshot shows the Zammad web interface. On the left is a dark sidebar with navigation links: Dashboard, Chat, Overviews, Customer Chat, Settings, Branding, System, Security, Ticket, Integrations, API, Objects (highlighted), Translations, Maintenance, Packages, and Sessions. The main content area is titled 'Ticket Object Manager' and shows a 'Database Update required' notification. The notification text states: 'Changes were made that require a database update. This might take some time where the system can't be used. Please update database changes only in a maintenance timeslot.' It lists the changes: 'Create: Ticket.serialno (input)' and 'Create: User.apitoken (input)'. There are buttons for 'Discard Changes' and 'Update Database'. Below the notification is a table listing ticket fields.

DISPLAY	NAME	TYPE	ACTION
Customer	customer_id	user_autocompletion	
Title	title	input	
Type	type	select	
Group	group_id	select	
Owner	owner_id	select	
State	state_id	select	
Pending till	pending_time	datetime	

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Questions? 😎



Zammad

Thank you!

Ready to use → <https://zammad.com>

Download → <https://zammad.org>

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Germany