gorgias

Basic User Guide

Olivia Istvan
July 2021

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Edition Notice

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First Printing July 2021

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Additional Information

This guide is created for educational purposes only. For more information about Gorgias, visit gorgias.com.

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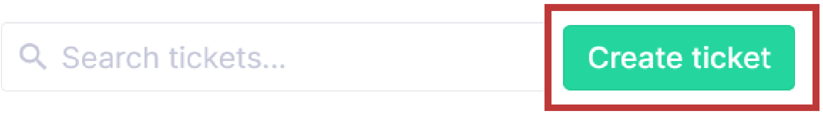
Chapter 1: Ticket Basics

This chapter will explain the basics of tickets in Gorgias, including creating a ticket, responding to a ticket, and assigning tickets to specific users. For the purposes of this guide, a ticket will be defined as any form of communication carried out through Gorgias between you, as a representative of your business, and one of your customers. This can include email, instant message chats, and phone calls. For the sake of simplicity, this user guide focuses specifically on email and instant message tickets.

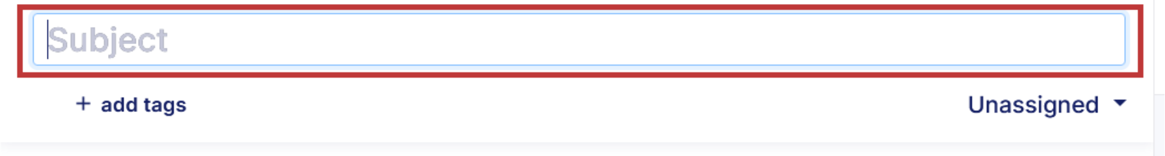
Creating a new ticket

To create a new email ticket in Gorgias, follow these simple steps:

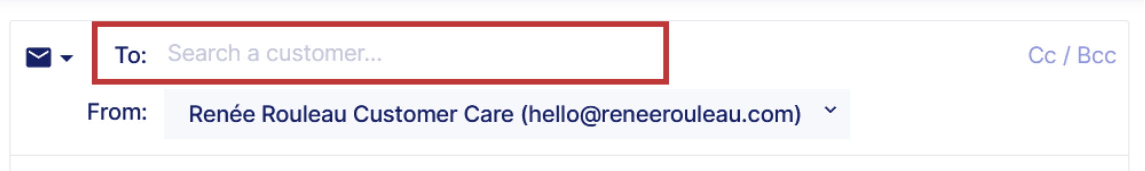
1. Click the green button in the upper right-hand corner of the screen labeled "Create ticket".



2. Enter the subject of your email in the "Subject" line.



3. Enter the email address of the customer you are trying to reach in the "To:" line.[1].



From: Renée Rouleau Customer Care (hello@reneerouleau.com)

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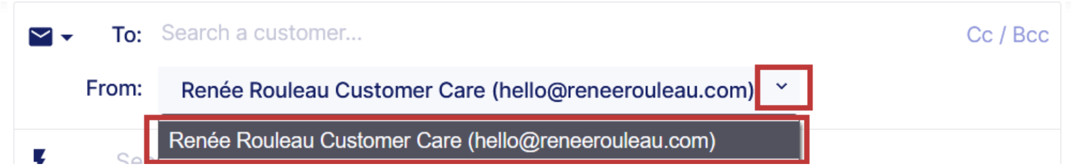
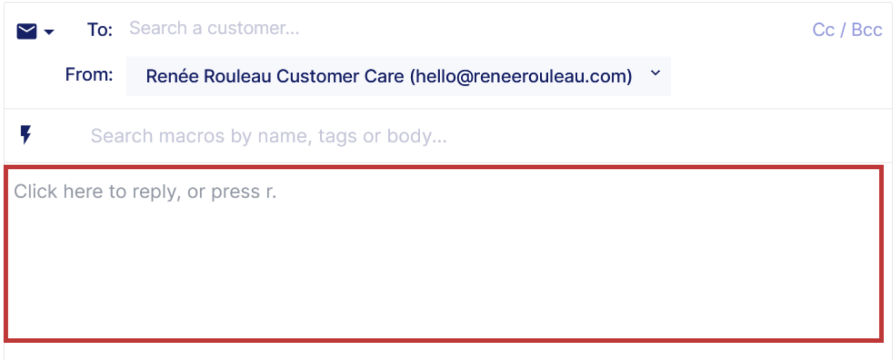
[1] If your company's Gorgias information is linked with your merchant software, you can use the "To:" line to search for a specific customer by name. For more information about merchant integration, please see the Advanced Gorgias User Guide.

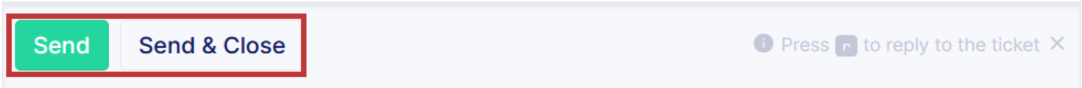
4. Select the sender email address. If you have multiple email addresses associated with your company connected in Gorgias, select the desired email address you would like to send from in the "From:" drop-down menu.


To: Search a customer...
From: Renée Rouleau Customer Care (hello@reneerouleau.com)
Renée Rouleau Customer Care (hello@reneerouleau.com)

5. Type your message in the body section of the screen. Alternatively, you can apply a preset macro (see "Creating and Using Macros" on page 5).


To: Search a customer...
From: Renée Rouleau Customer Care (hello@reneerouleau.com)
Search macros by name, tags or body...
Click here to reply, or press r.

6. Send your message. Clicking the green "Send" button will send your message and leave the new ticket in the "Open" status. Clicking "Send & Close" will send your message and close the ticket. Closed tickets will automatically reopen if the customer responds to your message.

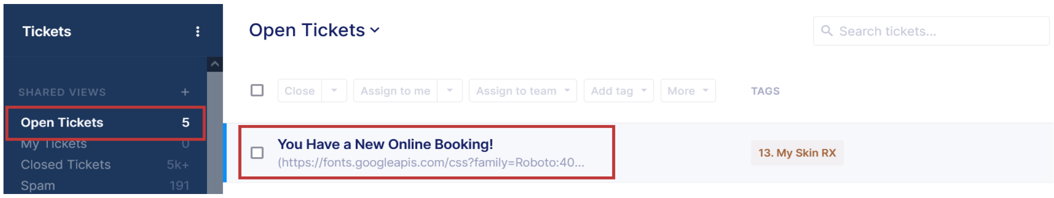

Send
Send & Close
Press r to reply to the ticket

You have now successfully created a new ticket, and sent an email to your customer.

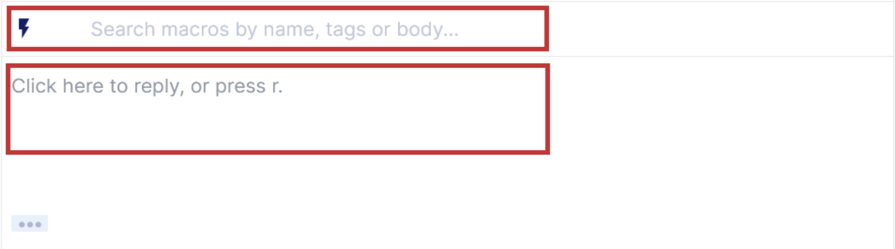
Responding to an existing ticket

You may have noticed that the previous section only explained the process for creating an email ticket. This is because instant message tickets are always initiated by the customer through your company's website, and thus cannot be created by you as a representative. Once any kind of ticket has been created, you can easily respond to it.

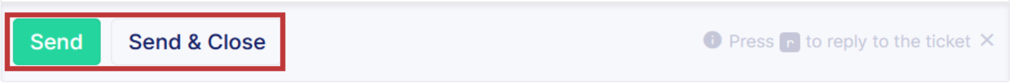
1. Open the ticket you want to respond to by clicking on it in your "Open Tickets" ticket view.


Tickets
SHARED VIEWS
Open Tickets 5
My Tickets 0
Closed Tickets 5k+
Spam 191
Open Tickets
Search tickets...
Close
Assign to me
Assign to team
Add tag
More
TAGS
You Have a New Online Booking!
(https://fonts.googleapis.com/css?family=Roboto:40...
13. My Skin RX

2. Read the customer's message, and formulate your response.
3. Type your response to the customer's inquiry in the body section of the screen. Alternatively, you can select a macro.


Search macros by name, tags or body...
Click here to reply, or press r.

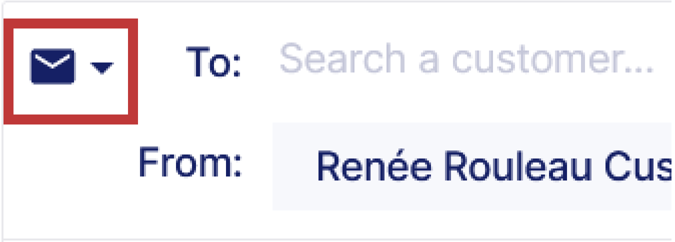
4. Send your message. Clicking the green "Send" button will send your message and leave the ticket in the "Open" status. Clicking "Send & Close" will send your message and close the ticket.


Send
Send & Close
Press r to reply to the ticket

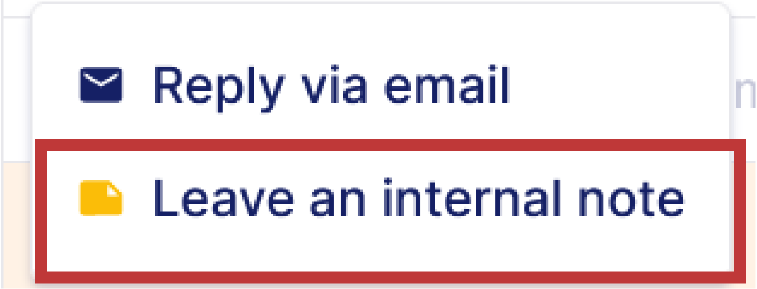
Internal communication

Sometimes tickets require internal communication between users before sending a response. To communicate with another user regarding a ticket in Gorgias, you can leave an internal note.

1. Click the mail icon next to the "To:" and "From:" section of the ticket screen.

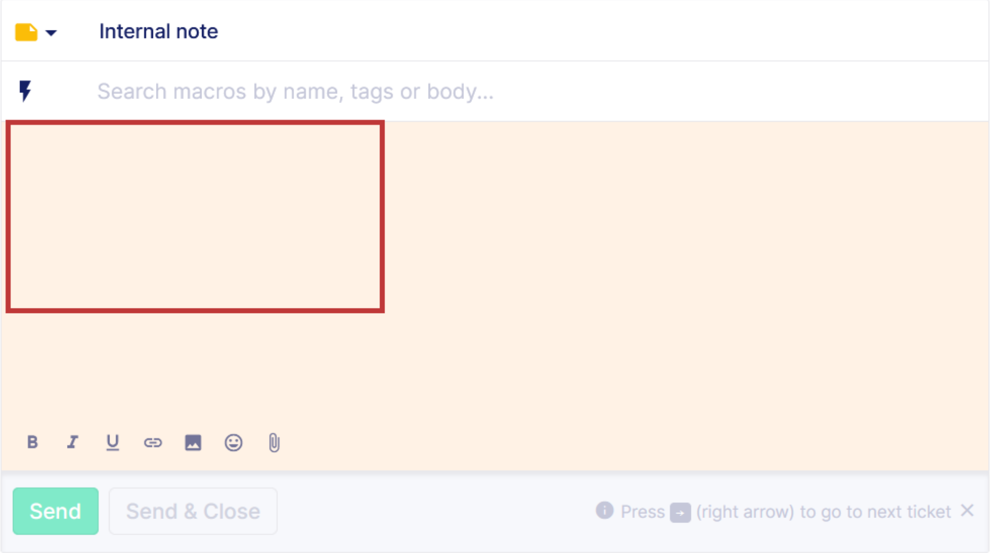

To:
Search a customer...
From:
Renée Rouleau Cus

2. Select "Leave internal note".

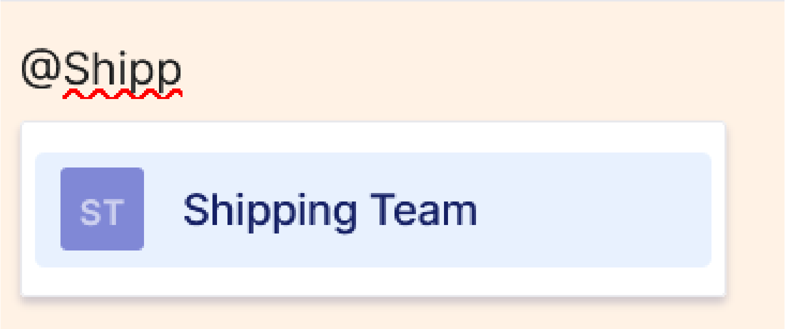

Reply via email
Leave an internal note

The body section of the ticket now appears yellow, to indicate that you are leaving an internal note. Internal notes are NOT visible to the customer and will only be seen by yourself and your fellow users.

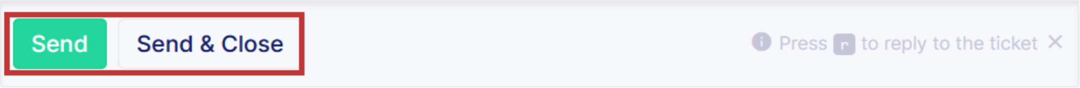
3. Type your internal note in the yellow body section. You can either leave general information or tag another user for reference or input.


Internal note
Search macros by name, tags or body...
Send
Send & Close
Press (right arrow) to go to next ticket

4. To tag another user, type an "@" symbol in the yellow field, and then begin typing their name. Gorgias will automatically suggest users based on what you are typing, When you see the desired user pop up, click their name. This will create the tag, and when the internal note is sent, they will receive a notification of the tag.


@Shipp
ST
Shipping Team

5. Send your message. Clicking the green "Send" button will send your message and leave the ticket in the "Open" status. Clicking "Send & Close" will send your message and close the ticket. Closed tickets will automatically reopen if the customer or another user responds to the ticket.


Send
Send & Close
Press to reply to the ticket

.

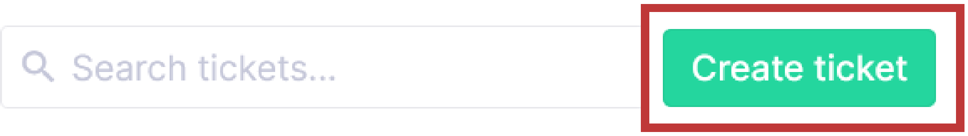
Chapter 2: Creating and Using Macros

Macros are a tool that you can use to help you quickly answer commonly received questions by providing a pre-written response you can quickly insert into your ticket. This chapter will cover how to create and use macros for email and instant message tickets.

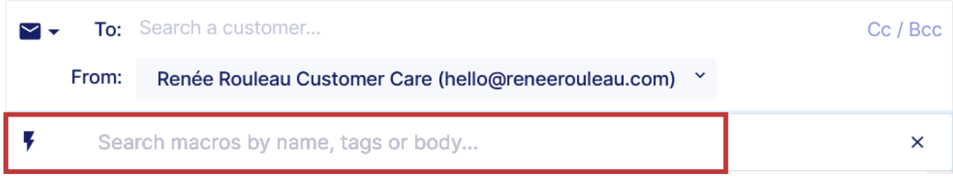
Creating a macro

To create a new macro, follow these steps:

1. Click the green "Create ticket" button in the upper right-hand corner of the screen. Alternatively, you can open an already existing ticket.


Search tickets...
Create ticket

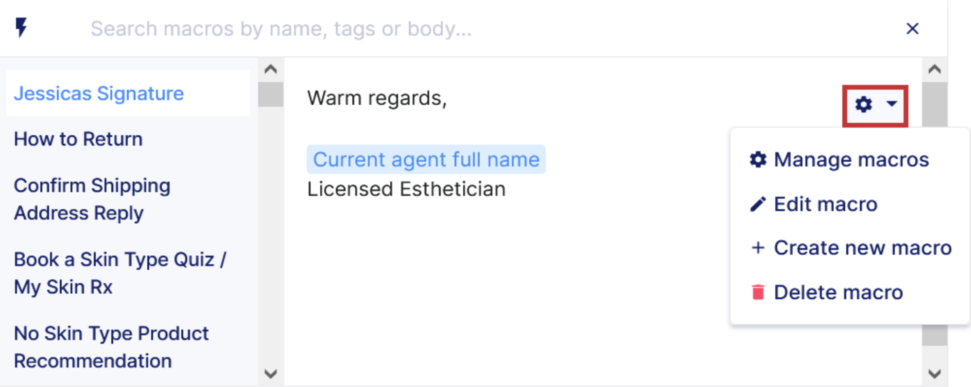
2. Click inside of the text bar with a lightning bolt symbol next to it that says "Search macros by name, tags, or body...".


To:
Search a customer...
Cc / Bcc
Search macros by name, tags or body...
×

From: Renée Rouleau Customer Care (hello@reneerouleau.com)

A menu should appear below it showing any existing macros.

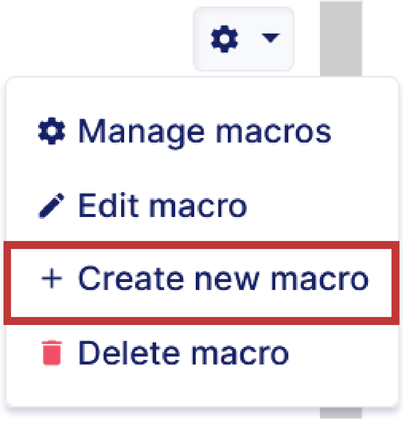
3. Click the small gear icon that appears below the macro bar once you have clicked on it. This will display several options relating to macros.

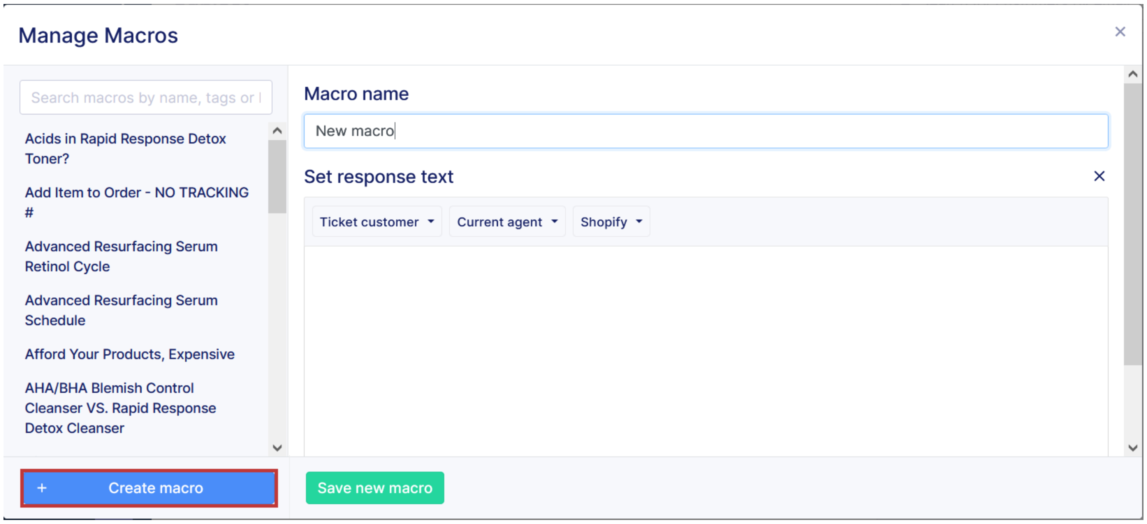

Search macros by name, tags or body...
×
Jessicas Signature
How to Return
Confirm Shipping Address Reply
Book a Skin Type Quiz / My Skin Rx
No Skin Type Product Recommendation
Manage macros
Edit macro
+ Create new macro
Delete macro

Warm regards,

Current agent full name
Licensed Esthetician

4. Click "Create new macro". This will launch the "Manage macros" screen with a new macro template open. Alternatively, you can click "Manage macros", and in the following screen click the blue "Create macro" button.


Manage macros
Edit macro
+ Create new macro
Delete macro


Manage Macros
×
Search macros by name, tags or l
Macro name
Set response text
×
Ticket customer
Current agent
Shopify
+ Create macro
Save new macro

Acids in Rapid Response Detox Toner?

Add Item to Order - NO TRACKING #

Advanced Resurfacing Serum Retinol Cycle

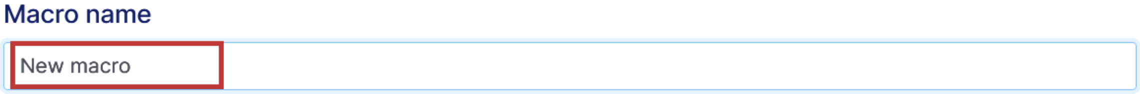
Advanced Resurfacing Serum Schedule

Afford Your Products, Expensive

AHA/BHA Blemish Control Cleanser VS. Rapid Response Detox Cleanser

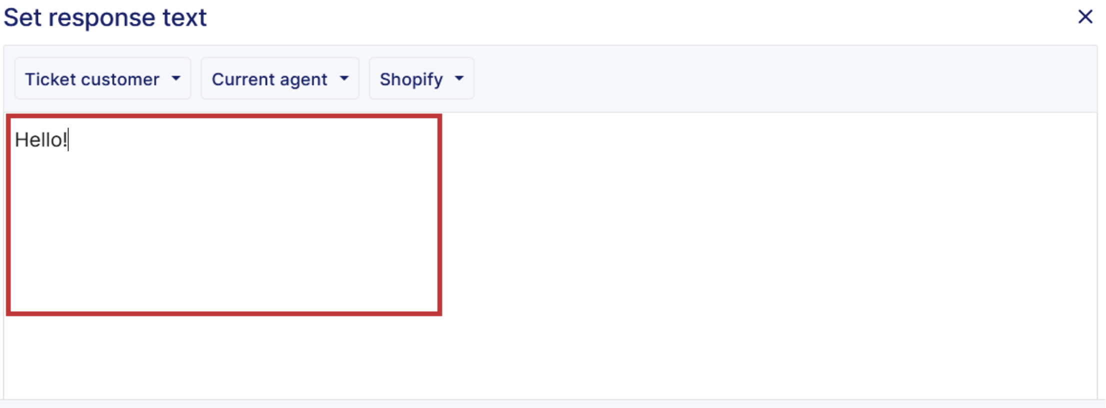
Macro name: New macro

5. Set the name of your macro in the "Macro name" field. It will have "New macro" in this field by default, which you can easily delete.



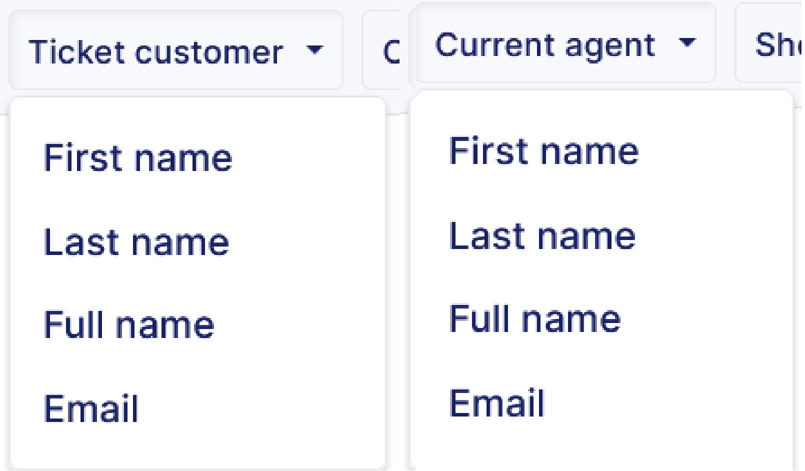
New macro

6. Enter the body text of your macro in the "Set response text" field.


Set response text
×
Ticket customer
Current agent
Shopify

Hello!

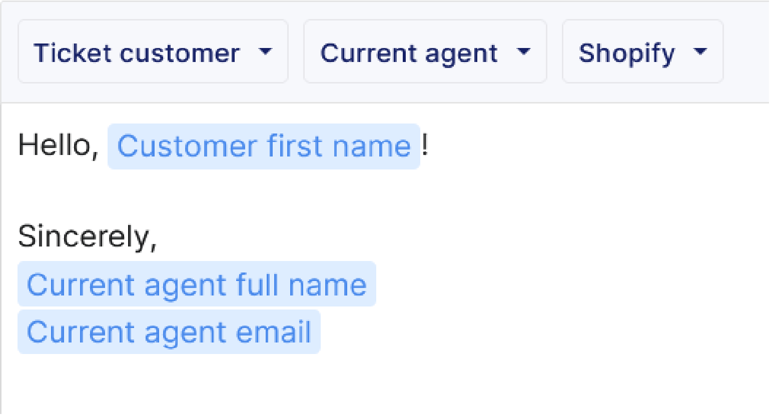
There are several variable options available above this field to allow you to set placeholders for information Gorgias can obtain by default. The default options available are shown below[1]:


Ticket customer
C
Current agent
Sh
First name
Last name
Full name
Email
First name
Last name
Full name
Email

These options allow you to automatically insert information into your macros.

For instance, if you are communicating with a customer whose name is "Jane Doe", and you have selected the variable "First name" in your macro, Gorgias will automatically populate "Jane" in place of this variable when responding to Jane's email with a macro.

Similarly, selecting the variables in the "current agent" drop-down will insert information about the user answering the ticket. These variables are useful for signatures. See the image below for an example of a macro template with some of these variables inserted.


Ticket customer
Current agent
Shopify

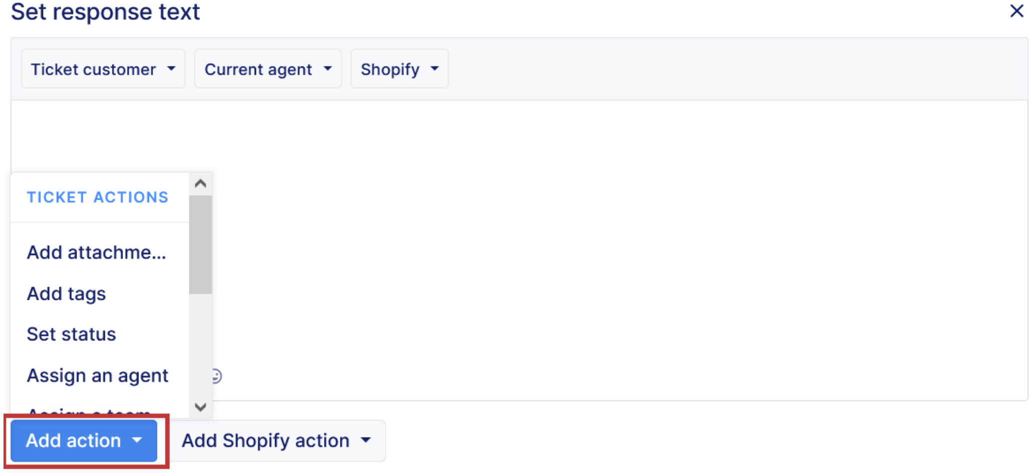
Hello, Customer first name!

Sincerely,
Current agent full name
Current agent email

---

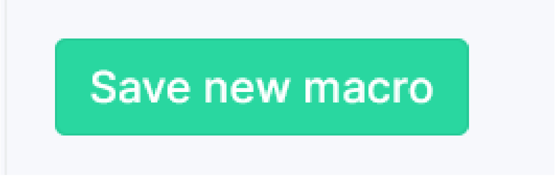
[1] In the screenshot of the body text area above, you can see a drop-down variable menu labeled "Shopify". This is because the company using Gorgias in these examples has linked their merchant software, Shopify, to Gorgias, allowing them more options for use in their macros and other areas. For simplicity, these options are not shown in this chapter. For more information, please see the Advanced Gorgias User Guide.

7. You can also set up a macro to perform an action when used in a message. Scroll below the body section of the macro screen and click the blue "Add action" button. This will display the default options available for a macro to perform.


Set response text
×
Ticket customer
Current agent
Shopify
TICKET ACTIONS
Add attachme...
Add tags
Set status
Assign an agent
Add action
Add Shopify action

Selecting these options will cause Gorgias to automatically execute the specified action every time the macro is used. For instance, selecting "Assign an agent" would allow you to select a specific user for the macro to automatically assign the ticket to whenever it is used (see also: "Assigning tickets" on page 11).

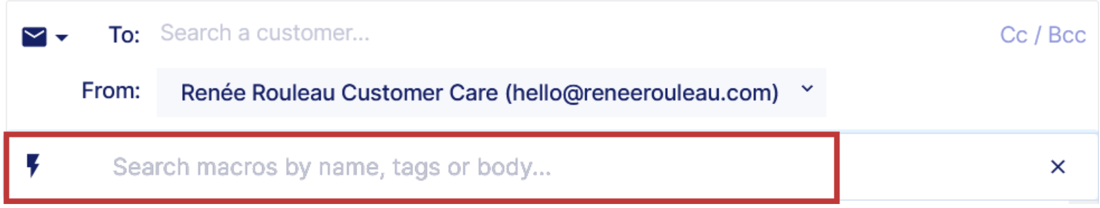
8. Click the green "Save new macro" button at the bottom of the "Manage macros" screen once you have completed your macro template.


Save new macro

Using an existing macro

Existing macros can be used to respond to already created tickets or when creating new tickets.

1. Click the field next to the lightning bolt when on the ticket screen.



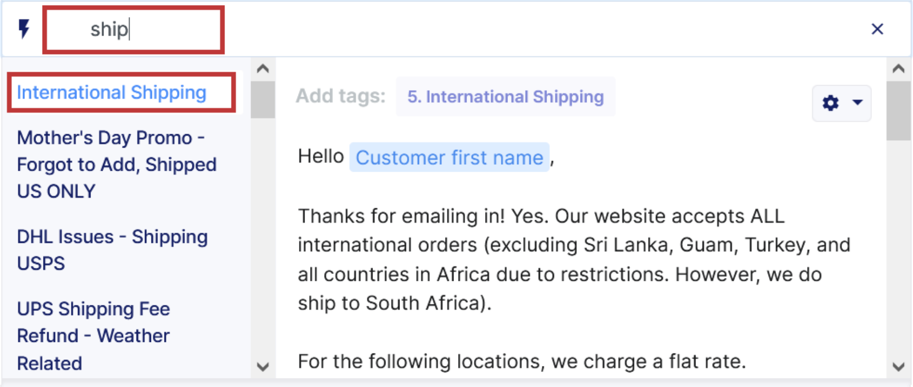
From: Renée Rouleau Customer Care (hello@reneerouleau.com)

To:
Search a customer...
Cc / Bcc
Search macros by name, tags or body...
×

This will cause frequently used macros to appear below the macro bar. If the desired macro is present, simply click on its name to apply it to your message. If you are looking for a different macro, you can search for it.

2. Begin typing either the name of the macro or the content of the macro into the field next to the lightning bolt. Macros matching the search parameters will begin to

appear. When you see the macro you would like to use, click on its name to apply it to your message.

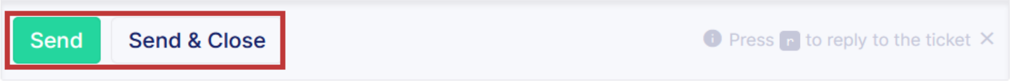

ship
International Shipping
Mother's Day Promo - Forgot to Add, Shipped US ONLY
DHL Issues - Shipping USPS
UPS Shipping Fee Refund - Weather Related
Add tags: 5. International Shipping

Hello Customer first name,

Thanks for emailing in! Yes. Our website accepts ALL international orders (excluding Sri Lanka, Guam, Turkey, and all countries in Africa due to restrictions. However, we do ship to South Africa).

For the following locations, we charge a flat rate.

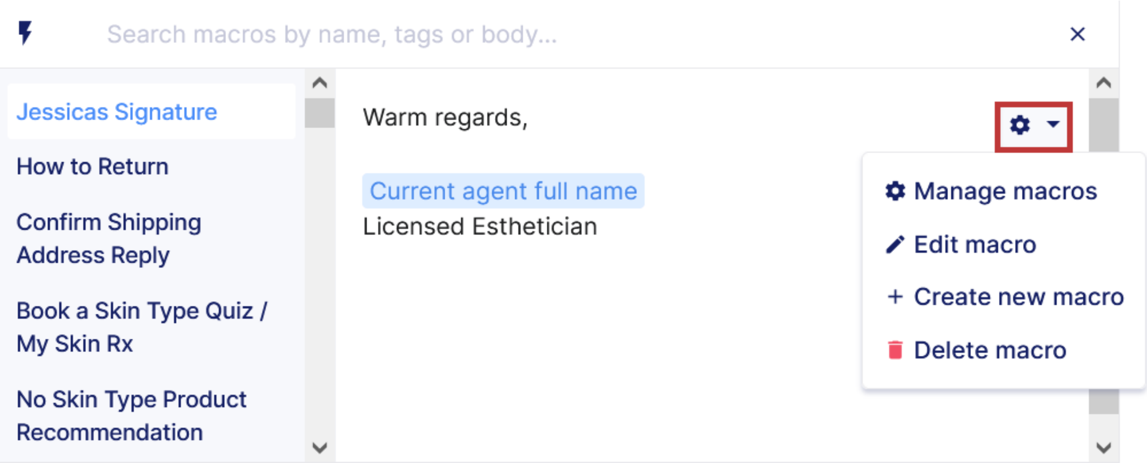
3. Make any edits to the email as needed. For instance, if the customer asked a question that requires you to add information that was not included in the macro, you can simply type it in as you would on a ticket with no macro inserted.
4. Send your message. Clicking the green "Send" button will send your message and leave the ticket in the "Open" status. Clicking "Send & Close" will send your message and close the ticket.


Send
Send & Close
Press r to reply to the ticket

Editing or deleting a macro

As your company's needs change, you may find that you need to edit or delete a macro. The process for doing so is very simple.

1. Access the macro settings drop-down menu by clicking in the macro search bar in a new ticket or existing ticket, and then clicking the gear icon.

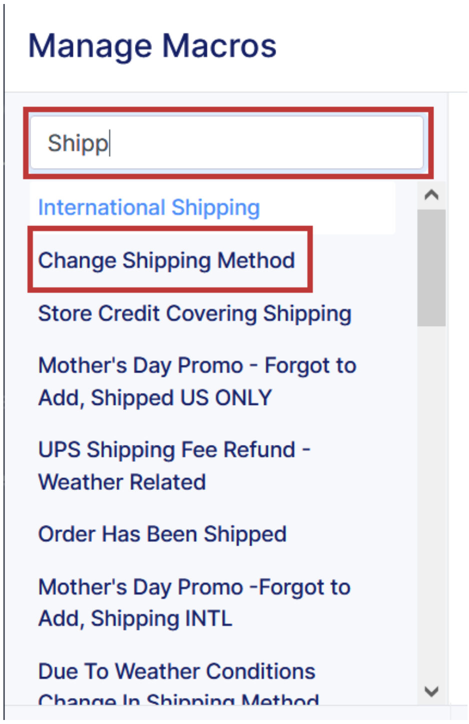

Search macros by name, tags or body...
Jessicas Signature
How to Return
Confirm Shipping Address Reply
Book a Skin Type Quiz / My Skin Rx
No Skin Type Product Recommendation
Manage macros
Edit macro
Create new macro
Delete macro

Warm regards,

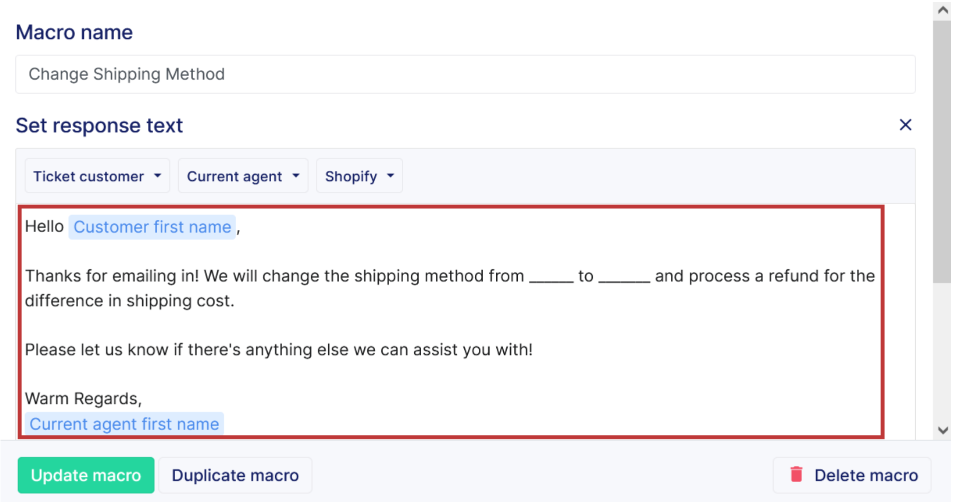
Current agent full name
Licensed Esthetician

2. Click "Manage macros" or "Edit macro".
3. In the "Manage macros" screen, use the search bar on the left to search for the macro you would like to edit by typing in its name. One it appears, click on the

name of the macro.


Manage Macros
Shipp
International Shipping
Change Shipping Method
Store Credit Covering Shipping
Mother's Day Promo - Forgot to Add, Shipped US ONLY
UPS Shipping Fee Refund - Weather Related
Order Has Been Shipped
Mother's Day Promo -Forgot to Add, Shipping INTL
Due To Weather Conditions Change In Shipping Method

4. Edit the macro which has populated on the right side of the screen in the "Set response text" field.


Macro name
Set response text
Ticket customer
Current agent
Shopify
Update macro
Duplicate macro
Delete macro

Change Shipping Method

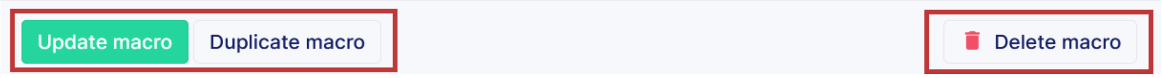
Hello Customer first name,

Thanks for emailing in! We will change the shipping method from _____ to ______ and process a refund for the difference in shipping cost.

Please let us know if there's anything else we can assist you with!

Warm Regards,
Current agent first name

5. Select how you would like to apply this edit. You can click "Update macro" to apply the edit to the current macro, "Duplicate macro" to create a second version of the macro with your edits applied, or "Delete macro" to delete the macro.


Update macro
Duplicate macro
Delete macro

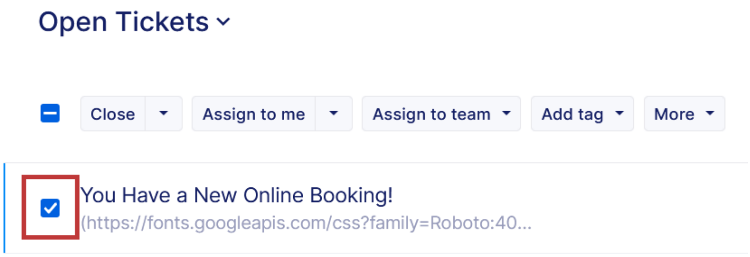
Chapter 3: Ticket Organization

Dealing with a large influx of tickets can be challenging, especially if your company has a small number of customer service representatives. This chapter will explain some of Gorgias' built-in organization methods, including assigning tickets, tagging tickets, and ticket views.

Assigning tickets

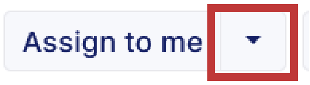
In order to better organize your tickets, you can assign them to a specific user. This can help speed up each user's response time and ensure that the best user for the job has easy access to their tickets.

1. Select the check box next to the ticket(s) you want to assign to a specific user.

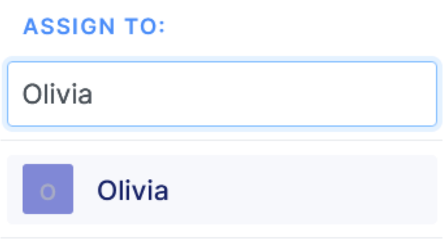


☑ You Have a New Online Booking!
(https://fonts.googleapis.com/css?family=Roboto:40...

2. Decide which user will be assigned to the ticket. If it is yourself, you can simply click "Assign to me" at the top of the column. To assign a different user, click the drop-down arrow next to the "Assign to me" button.



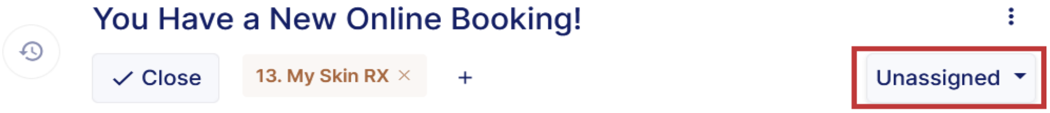
3. Type the name of the desired user in the box that appears, and click it to select it.



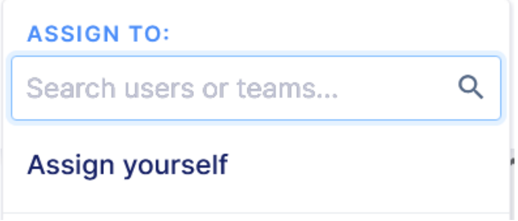
ASSIGN TO: Olivia

The user is now assigned to the ticket. Alternatively, you can assign a user to a ticket within the ticket itself.

1. Open the desired ticket.
2. Click the box labeled "Unassigned". A similar menu to the one found in the previous steps should appear.


You Have a New Online Booking!
✓ Close
13. My Skin RX ×
+
Unassigned

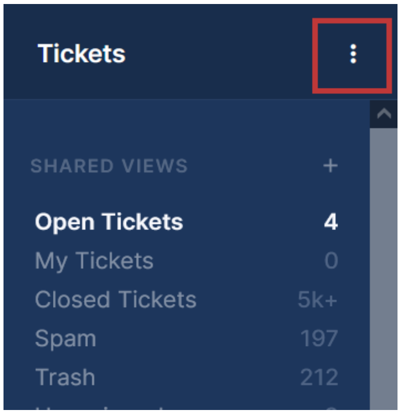
3. Use the search function to locate a user to assign the ticket to, as in the previous method, or click the "Assign yourself" button to assign yourself to the ticket.

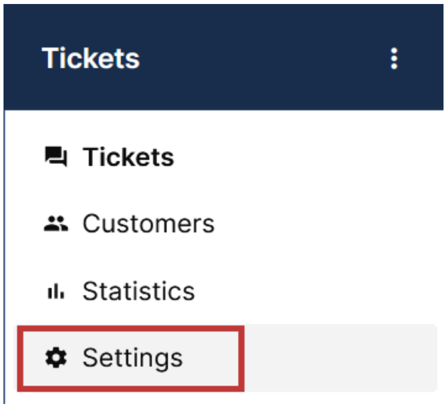

ASSIGN TO:
Search users or teams...
Assign yourself

Tagging tickets

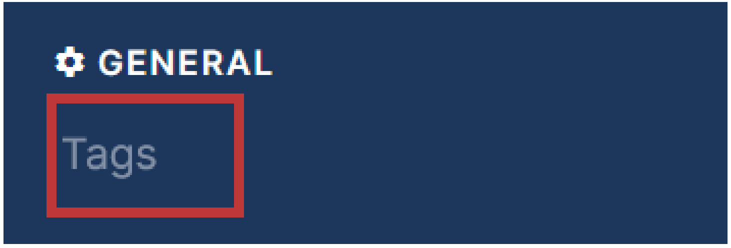
You can create and customize tags for your tickets in order to help filter them for searches and provide a quick reference for the subject of the ticket at a glance.

1. Create a tag. From your home screen in Gorgias, click the three dots to open a menu. In this menu click "Settings".

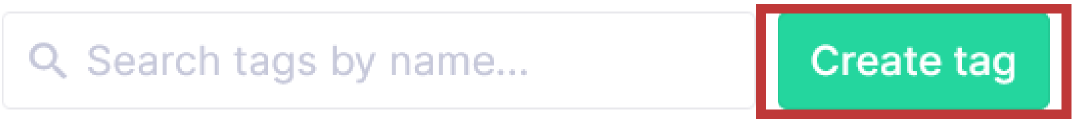

Tickets
SHARED VIEWS
Open Tickets 4
My Tickets 0
Closed Tickets 5k+
Spam 197
Trash 212


Tickets
Tickets
Customers
Statistics
Settings

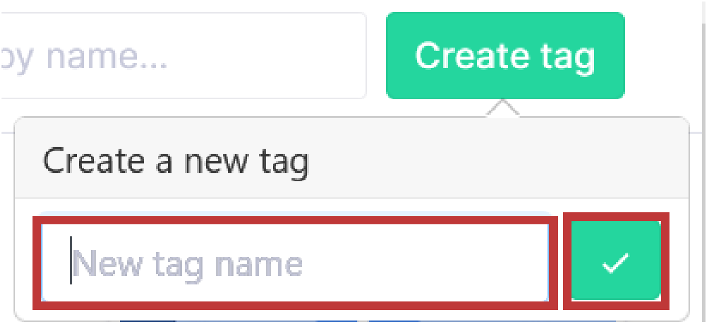
Click "Tags" underneath "General" in the panel on the left-hand side of the screen.


GENERAL
Tags

2. Click the green "Create tag" button in the upper right-hand corner of the screen.

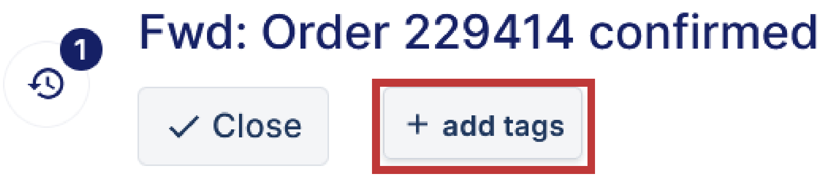

Search tags by name...
Create tag

3. Enter the name of the tag you would like to create and click the green check mark button.

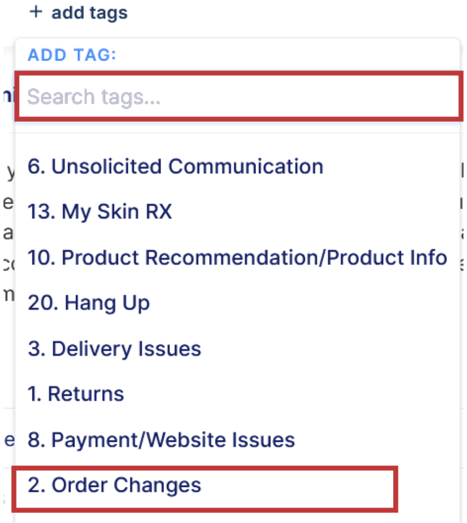

by name...
Create tag
Create a new tag
New tag name
✓

You have now created a tag. Next, you will see how to apply tags to tickets.

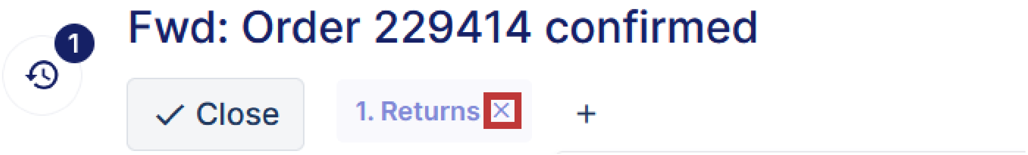
1. Open a ticket by clicking on it in your "Open tickets" view. Alternatively, you can follow the same steps below on a new ticket when you are creating it.
2. Click the"add tags" button beneath the subject line of the ticket.


1
Fwd: Order 229414 confirmed
✓ Close
+ add tags

3. Type the tag you would like to apply, or click on it in the menu that appears.


+ add tags
ADD TAG:
Search tags...
6. Unsolicited Communication
13. My Skin RX
10. Product Recommendation/Product Info
20. Hang Up
3. Delivery Issues
1. Returns
8. Payment/Website Issues
2. Order Changes

The tag is now applied. If you find you have selected an incorrect tag, you can easily remove it by clicking on the small "x" next to the tag.

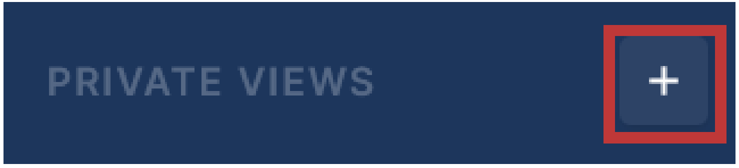

Fwd: Order 229414 confirmed

Ticket views

Ticket views are essentially saved search parameters that allow you to view tickets that meet certain criteria. There are several default ticket views, including "Open Tickets", which shows all tickets that currently have their status set to "open", "Closed Tickets", showing all tickets that currently have their status set to "closed", and "My Tickets", which will show you any tickets assigned to yourself, as well as "Spam" and "Trash".

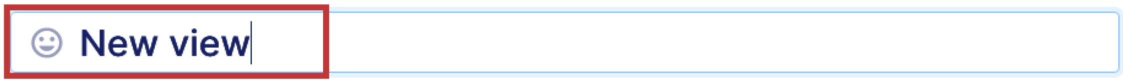
You can create your own custom ticket views to allow for ease of access to specific kinds of tickets.

1. Click the plus sign next to "Shared views" or "Private views" on the home screen. Creating a new "Shared" view will allow your view to be visible to all members of your company, while a private view will be visible only to the user who creates it.

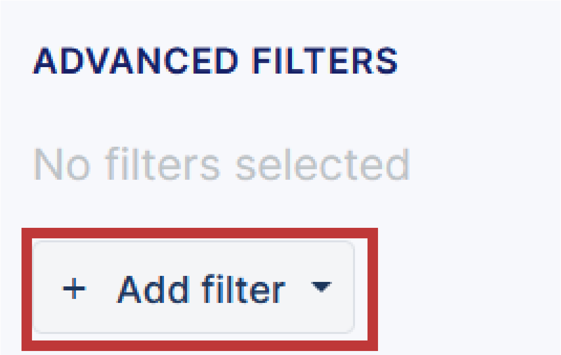


Click "Create view" in the small menu that appears.

2. Type the name of your new view in the bar at the top of the screen.

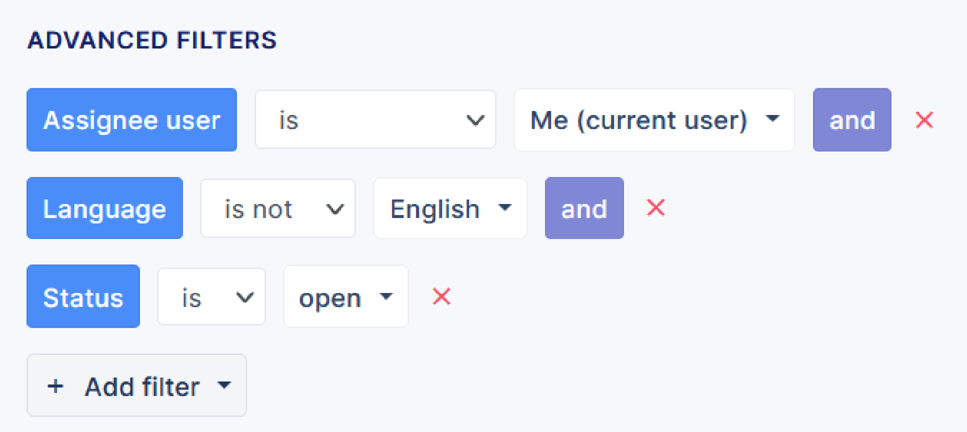

New view

3. Add filters to your view. This will determine the criteria your ticket view will be searching for. Click the "add filter" button to see the available filters.


ADVANCED FILTERS

No filters selected

Shown below is an example of how several applied filters and their advanced options would appear. Additional options include ticket creation date, date of last message in the ticket, applied tags, and more.



ADVANCED FILTERS

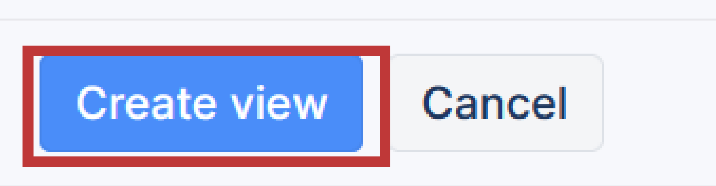
Assignee user is Me (current user) and

Language is not English and

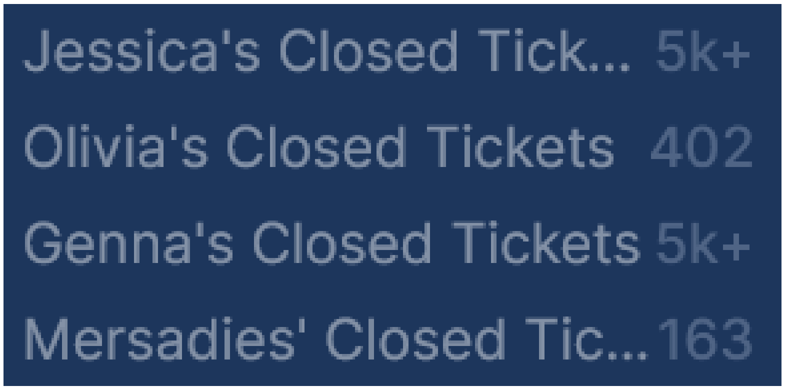
Status is open

Explore your options for filters and apply the filters that meet your needs for your ticket view.

4. Click the blue "Create view" button.



Your ticket view is now created. It will be visible in the panel on the left-hand side of the screen. You can click on the view at any time to see the tickets that meet its filter's parameters.



Jessica's Closed Tick... 5k+

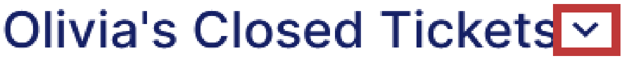
Olivia's Closed Tickets 402

Genna's Closed Tickets 5k+

Mersadies' Closed Tic... 163

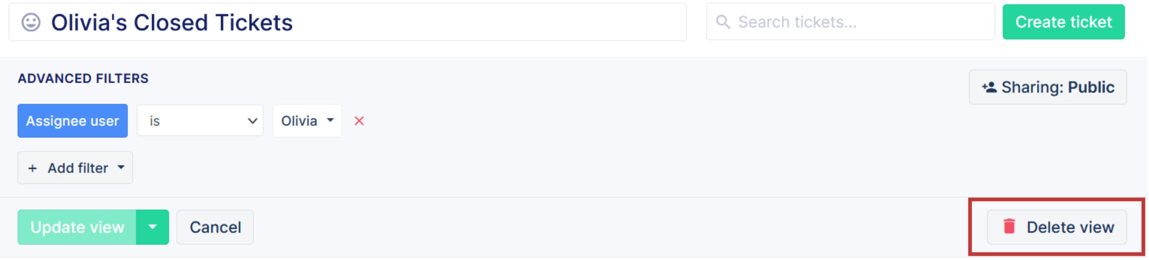
Deleting a ticket view is very simple.

1. Click on the view you would like to delete in the left-hand side of the screen.
2. Click the arrow next to the name of the ticket view at the top of the screen.



Olivia's Closed Tickets

3. Click the "Delete view" button.


Olivia's Closed Tickets
Search tickets...
Create ticket
ADVANCED FILTERS
Sharing: Public
Assignee user
is
Olivia
+ Add filter
Update view
Cancel
Delete view

The view is now deleted.

Glossary

F

Filter
Search criteria used to create ticket views.

I

Internal note
A form of communicating with the other members of your organization within a specific ticket.

M

Macro
User-created templates. Can be pre-written to help quickly answer frequently asked questions or provide a template for quick responses.

T

Tag
An organization tool that allows you to categorize tickets based on labels you apply to indicate their contents.

Ticket
Any form of communication between your organization and a customer, usually in the form of an email or instant message.

Ticket views
Specialized search parameters saved for easy access to tickets meeting the search criteria.

V

Variable
An insertable option available when creating a macro that will automatically populate information in Gorgias when the macro is used. (ex: "Customer first name" will populate with the customer's first name)

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  responding 2-3
  tagging 12-13
ticket views 14-16

gorgias

Basic User Guide

Olivia Istvan
July 2021