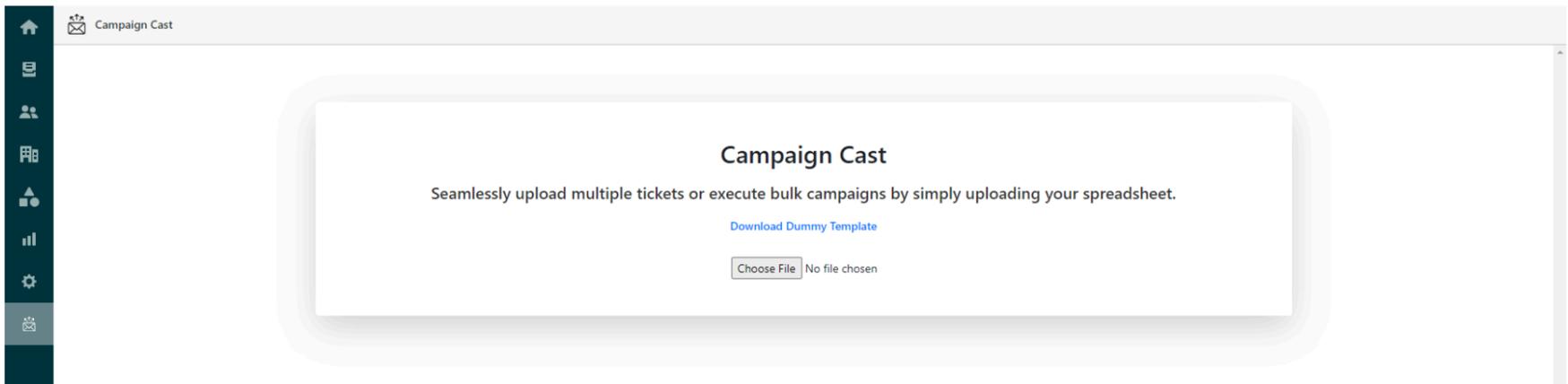## App Overview: Bulk Ticket Upload & Campaign Cast Emails

With the help of this app, agents can upload bulk tickets and send customer outreach emails efficiently.

Follow the steps below to use the app:

Accessing the App

1. **Open the Agent Dashboard**.
2. **Click the App Icon** to open the app interface.

CSV File Creation & Upload

1. **Create the CSV File** using the provided template.

   https://helpdeskshop.com/wp-content/uploads/campaign_cast/dummy1.csv

2. The **CSV Template** includes columns for **customer names** and their **email addresses**. You must fill in these details.
3. The **last three columns are optional**; these are for saving custom information in the ticket. If you need to save this custom data, you must specify the **custom ticket field ID** using the format `cf_<ticket field id>`.

How to Find the Custom Ticket Field ID

1. Open the **Admin Center**.
2. Navigate to **Objects & Rules** > **Fields (under Ticket)**.
3. Find the **custom ticket field** and copy the **ticket field ID**.

Proceeding with CSV Upload

1. After uploading the CSV, click the **"Proceed to Next Page"** button.

Using Placeholders

- You can use **placeholders** in the email body based on the columns in your CSV file.

- Placeholders will automatically pull in customer data from the CSV and customize the emails.
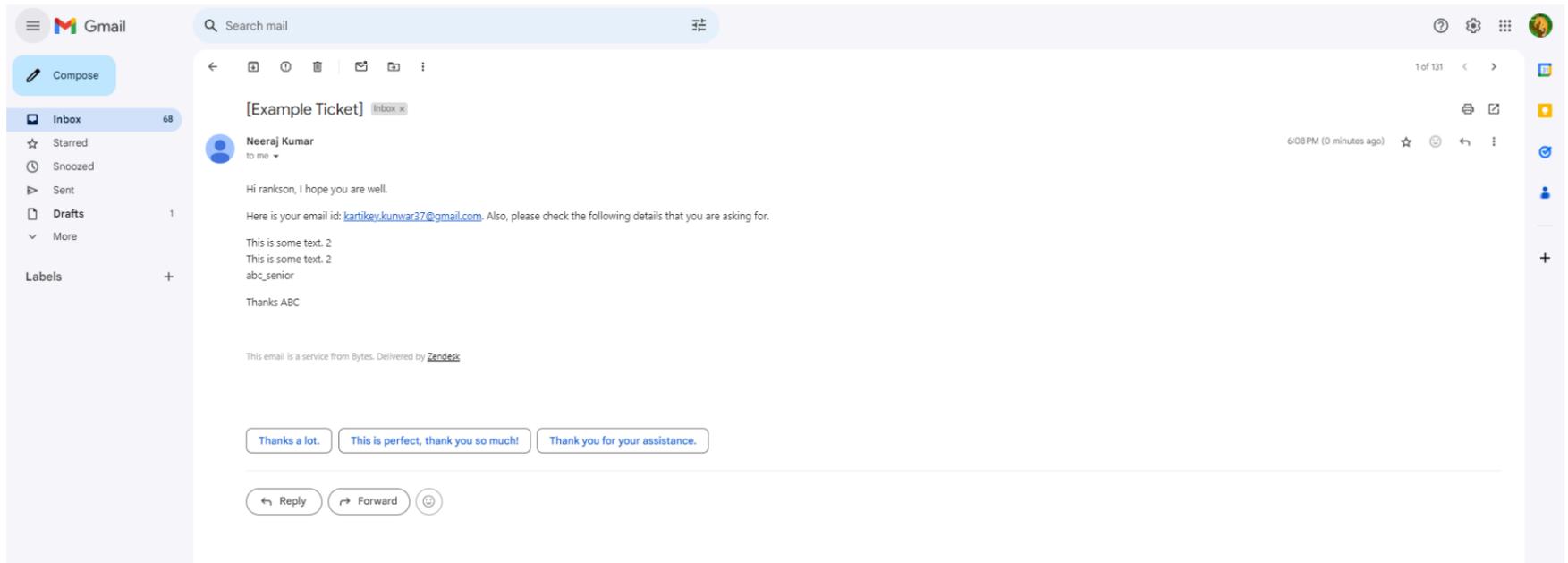

Campaign and Notification Settings

1. **Subject Line**: Set the subject of the email.
2. **Email Body**: You can send the email in **two formats**:
   - **Plain Text**: Toggle off the **Is HTML** button.
   - **HTML Body**: Toggle on the **Is HTML** button.
3. **Is Campaign Field**: By default, this is set to **True**. Uncheck this option if you are not sending a campaign and only want to create a ticket on the customer's behalf.
4. ## Auto-Solve Feature
   - The **Is AutoSolve** option is available if you want the ticket to be automatically resolved after creation.
5. **Acknowledgment Notification**:
   - If the campaign field is unchecked, a new option will appear, allowing you to send an acknowledgment email to the client.
   - Check this checkbox if you want the client to receive an email notification. If the "Acknowledgment Notification" checkbox is left unchecked, only the ticket will be created and no email notification will go to the customer.
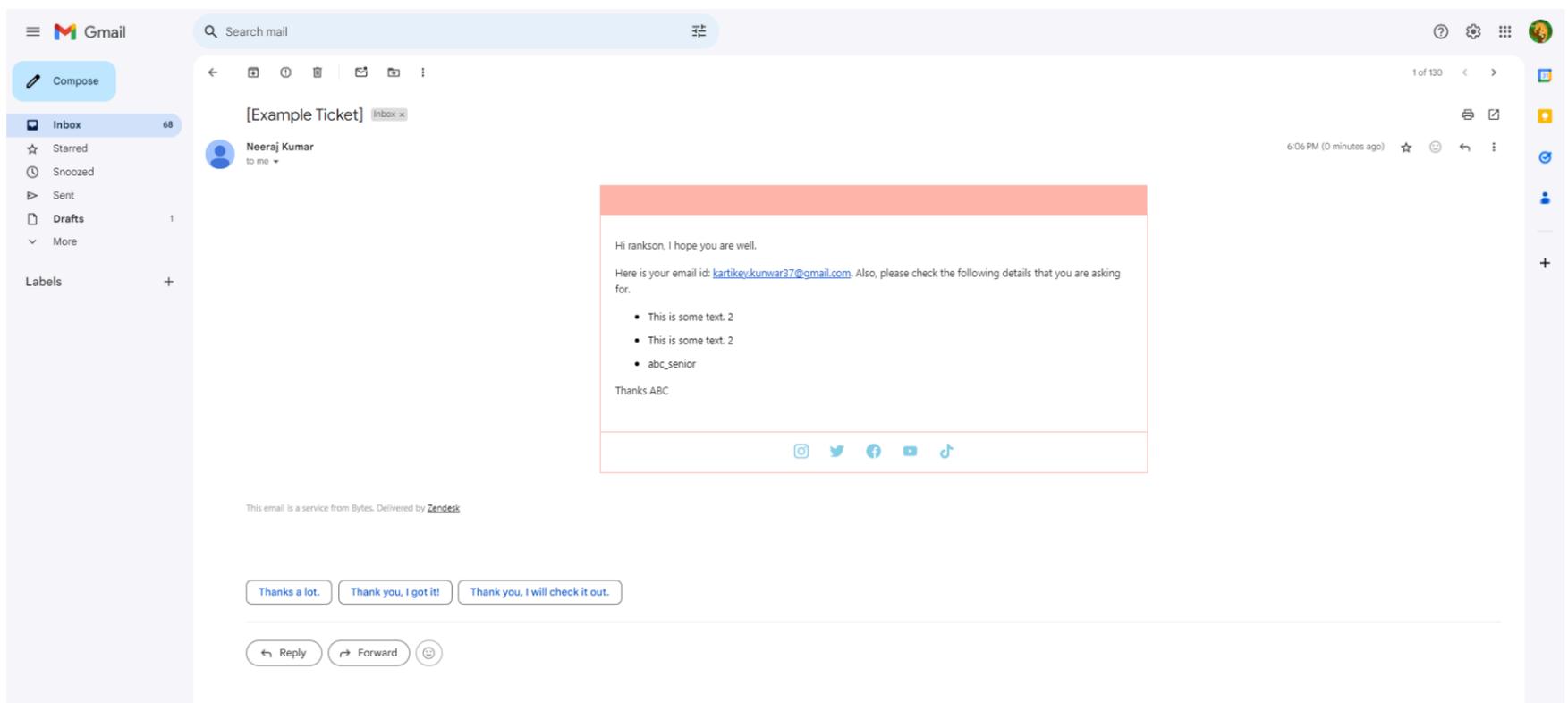

Email screenshot:

Plain text:

Html body:

Create Triggers in Zendesk

Please follow a step-by-step guide to creating three specific triggers in Zendesk:

1. **Send Bulk Uploaded Tickets Acknowledgment**
2. **Send Campaign Email**
3. **Solved Bulk Mailer Tickets**

Step 1: Access the Admin Center

1. Log in to Zendesk.
2. Click on the **Admin Center** by selecting the gear icon in the sidebar.
3. In the **Admin Center**, navigate to **Objects and rules > Business rules > Triggers**.

Step 2: Create a New Trigger Category

1. On the **Triggers** page, scroll to the **Categories** section and click **Create Category**.
2. Name the category something relevant to your triggers, like "Campaign Cast Triggers"

Trigger 1: Send Bulk Uploaded Tickets Acknowledgment

Step 1: Create a New Trigger

1. In the **Triggers** section, click **Add Trigger**.
2. Name the trigger: `Send Bulk Uploaded Tickets Acknowledgment`.

Step 2: Set Trigger Conditions

- **Meet ALL of the following conditions**:
    1. **Ticket > Is > Created**.
    2. **Tags > Contains at least one of the following**: `bulk_uploaded`.
    3. **Tags > Contains at least one of the following**: `snd_ack`.
    4. **Tags > Contains at least one of the following**: `campaign`.

Step 3: Set Trigger Actions

- **Actions**:
    1. **Notify by > Email user**.
    2. **Select**: Ticket > Requester and CCs.
    3. **Email Subject**: Use the placeholder `{{ticket.title}}`.
    4. **Email Body**: Use the placeholder `{{ticket.latest_public_comment_html}}`.

Step 4: Save the Trigger

1. Review the conditions and actions.
2. Click **Save**.

Trigger 2: Send Campaign Email

Step 1: Create a New Trigger

1. In the **Triggers** section, click **Add Trigger**.
2. Name the trigger: `Send Campaign Email`.

Step 2: Set Trigger Conditions

- **Meet ALL of the following conditions**:
    1. **Ticket > Is > Created**.
    2. **Tags > Contains at least one of the following**: `bulk_uploaded`.
    3. **Tags > Contains at least one of the following**: `campaign`.

Step 3: Set Trigger Actions

- **Actions**:
    1. **Notify by > Email user**.
    2. **Select**: Ticket > Requester and CCs.
    3. **Email Subject**: Use the placeholder `{{ticket.title}}`.
    4. **Email Body**: Use the placeholder `{{ticket.latest_public_comment_html}}`.

Step 4: Save the Trigger

1. Review the conditions and actions.
2. Click **Save**.

Trigger 3: Solved Bulk Mailer Tickets

Step 1: Create a New Trigger

1. In the **Triggers** section, click **Add Trigger**.
2. Name the trigger: `Solved Bulk Mailer Tickets`.

Step 2: Set Trigger Conditions

- **Meet ALL of the following conditions**:
    1. **Ticket > Is > Created**.
    2. **Tags > Contains at least one of the following**: `bulk_uploaded`.

3. **Tags > Contains at least one of the following**: `autosolve`.

Step 3: Set Trigger Actions

- **Actions**:
  1. **Ticket > Status > Solved**.
- **Note:** If the **Status** category is not visible, use the **Ticket Status** property.

Step 4: Save the Trigger

1. Review the conditions and actions.
2. Click **Save**.

By following these steps, you can efficiently manage bulk ticket uploads and customer outreach campaigns.