

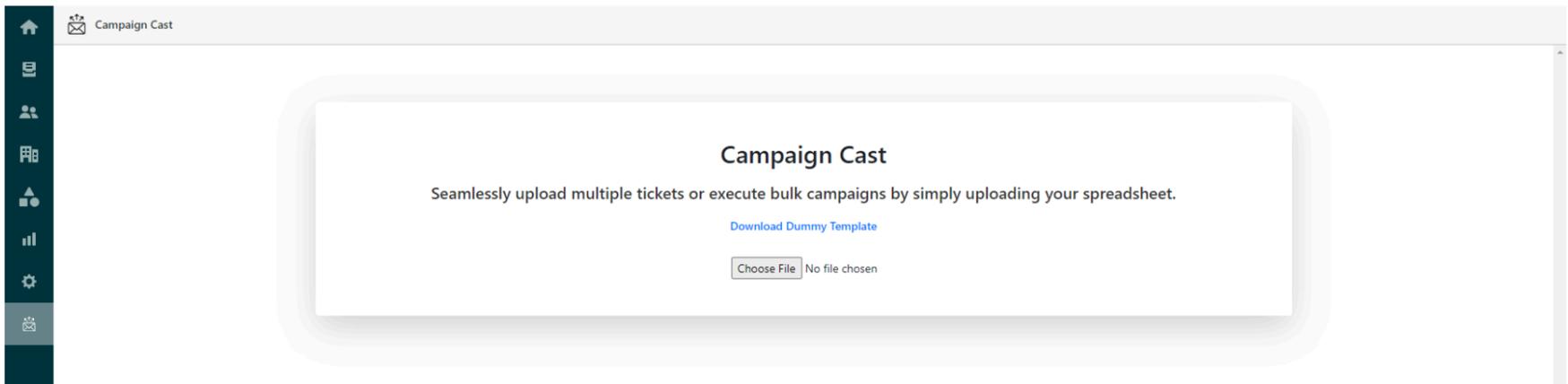
App Overview: Bulk Ticket Upload & Campaign Cast Emails

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>`.
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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**.

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Objects and rules > Tickets > Fields

Fields

Add fields to get more details about tickets. You can arrange these fields for agents and customers in ticket forms. [Learn about ticket fields](#)

Search: field

Filter: Active × Clear filters

Display name	Field ID	Type
Access Point Type	11200334745741	Drop-down
Assignee	10061372601997	Drop-down
Attach the floor plan by marking the issue lo...	21569577013133	Checkbox
Attach the screenshot of the Wi-Fi informati...	21569604329869	Checkbox
Attach the screenshots of the internet speed...	21569579480973	Checkbox
Billing Subcategory	25095308977933	Drop-down
channel_id	26933649002381	Drop-down
Core Issue	10490440091405	Drop-down
Dashboard Issue Type	27284353378317	Drop-down
Description	10061372597645	Multi-line

Proceeding with CSV Upload

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

Campaign Cast

Seamlessly upload multiple tickets or execute bulk campaigns by simply uploading your spreadsheet.

[Download Dummy Template](#)

Choose File dummy1.csv

Email validation passed

Proceed to next page

Row Number	customer_name	email	cf_21474802712989	cf_21474837404573	cf_21474839493405
1	jameson	jameson@gmail.com	This is some text.	123456	test1
2	Thomson	thomson@gmail.com	This is some text. 1	555	test2

Using Placeholders

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

Available Placeholders

Here are the available placeholders as per the CSV sheet.

- {{customer_name}}
- {{email}}
- {{cf_21474802712989}}
- {{cf_21474837404573}}
- {{cf_21474839493405}}

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

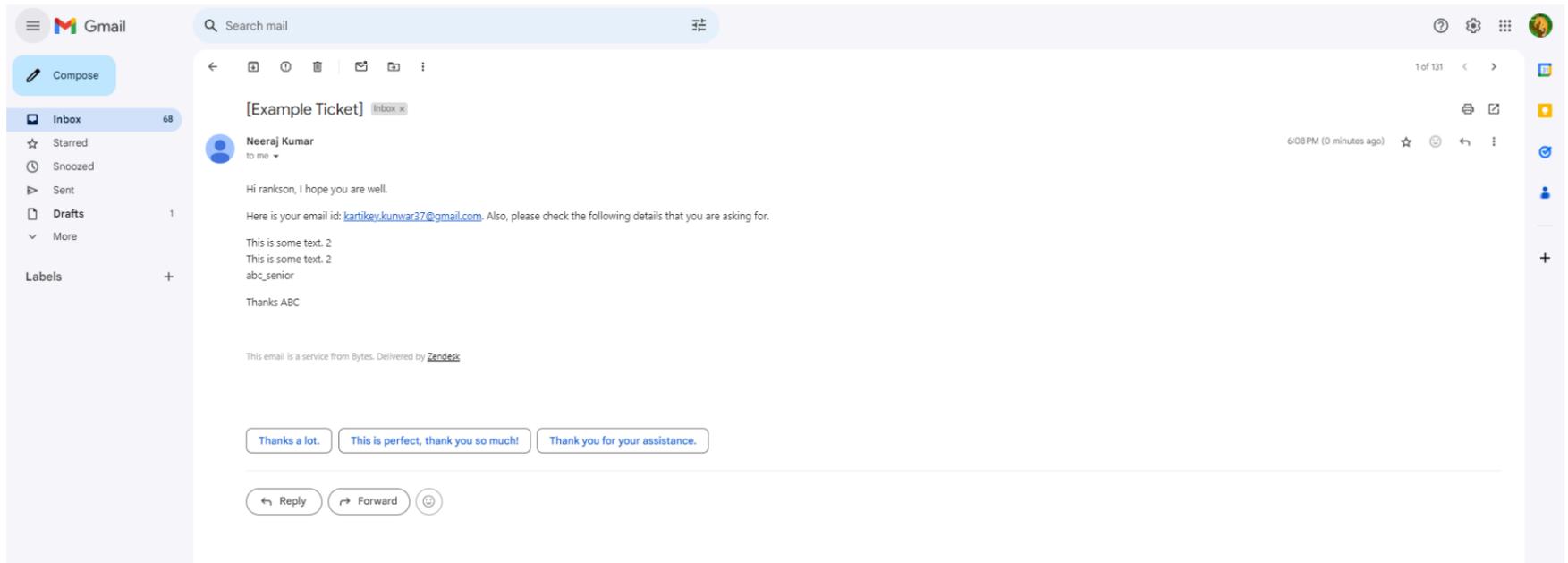
Campaign and Notification Settings

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.

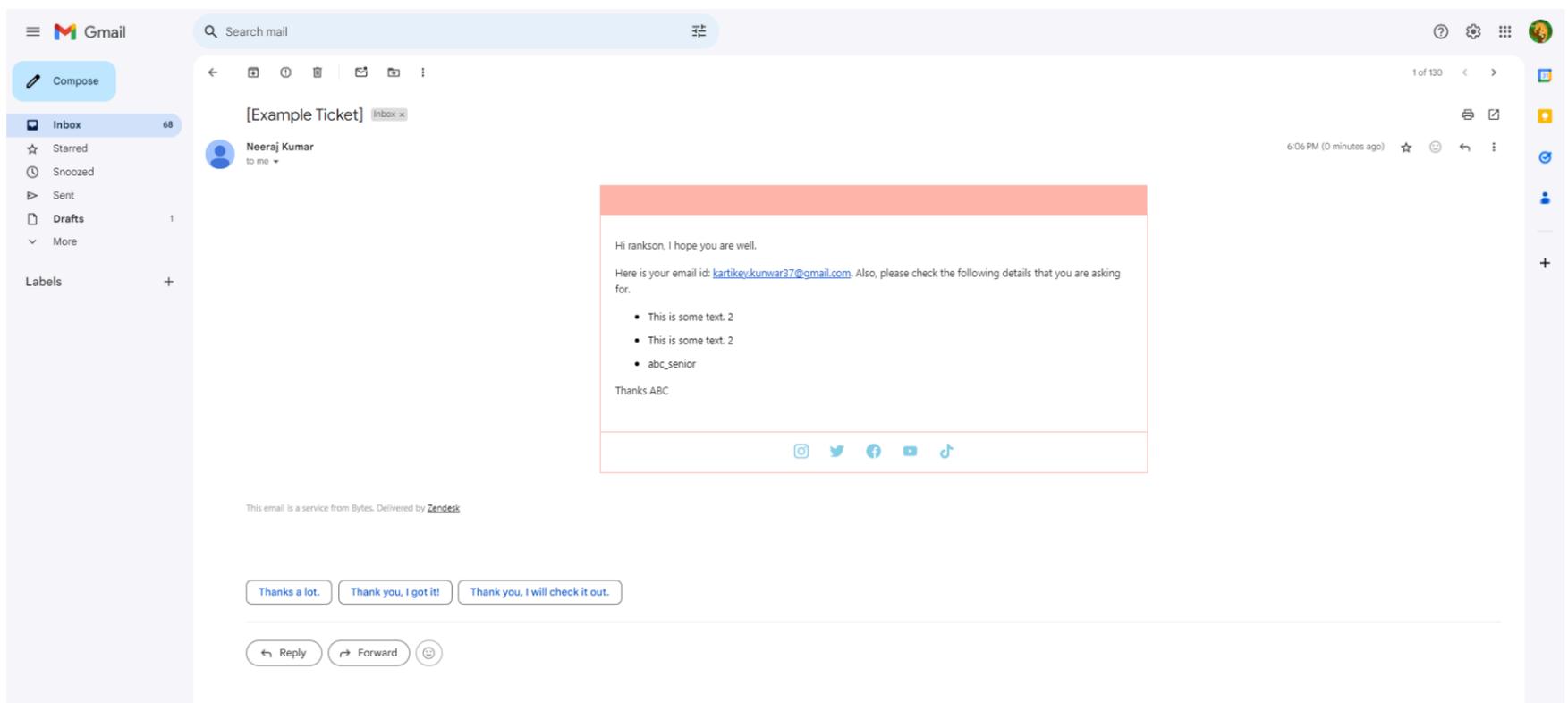
The screenshot displays the 'Campaign Cast' configuration page. At the top, there is a 'Subject' input field. Below it is the 'Email body' field, which contains HTML code for a centered table with a white background. To the right of the email body field is a 'Live Preview' window showing the rendered email. The preview includes a red header bar, a greeting 'Hi jameson, I hope you are well.', a line of text 'Here is your email id: jameson@gmail.com. Also, please check the following details that you are asking for.', a bulleted list of details, and a 'Thanks ABC' message. At the bottom of the preview are social media icons for Instagram, Twitter, Facebook, YouTube, and TikTok. Below the email body field are three toggle options: 'Is HTML?' (checked), 'Is Campaign?' (checked), and 'Is AutoSolve?' (unchecked). A 'Create tickets' button is located at the bottom right of the configuration area.

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.