



FM

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Premium Workflow

A practical guide – step by step

Support Ticket Triage

Triage support tickets automatically: classify intent, set priority and route each ticket to the right queue.

SUPPORT & AI

ADVANCED

ABOUT 2 HOURS SETUP

OVERVIEW

Support Ticket Triage

Triage support tickets automatically: classify intent, set priority and route each ticket to the right queue.

CATEGORY	DIFFICULTY	DURATION
Support & AI	Advanced	About 2 hours setup

What you use it for

Support teams handling high ticket volumes.

Tools in this workflow

OpenAI API · Zendesk Alternatives · n8n · Slack

How to implement it

1

Receive incoming tickets

Capture all incoming support tickets from various channels like email, web forms or social media in a central system.

WHAT YOU NEED TO DO

1. Set up an email inbox for support requests and connect it to your ticketing system.
2. Integrate web forms on your website that directly feed tickets into the system.
3. Use APIs from social media platforms to import messages as tickets.

CHECK AT THE END

- ☐ Email inbox is connected to the ticketing system.
- ☐ Website forms are correctly integrated.
- ☐ Social media is connected to the system.

RESULT

All incoming tickets will be centrally captured.

LINKS

Zendesk API: <https://developer.zendesk.com/api-reference/ticketing/introduction/>

2

Classify intent and urgency

Analyze each ticket's content to determine the customer's intent and urgency using AI-powered models.

WHAT YOU NEED TO DO

1. Create an AI model with the OpenAI API that classifies intent and urgency.
2. Integrate the model into your ticket system via API.
3. Test the classification with a sample of tickets.

CHECK AT THE END

- ☐ The AI model has been successfully trained.
- ☐ The model is integrated into the ticket system.
- ☐ Classification works with test tickets.

RESULT

Tickets will be classified by intent and urgency.

LINKS

OpenAI API: <https://platform.openai.com/docs/introduction>

3

Assign priority and tags

Assign priorities to each ticket and add relevant tags to enable faster identification and categorization.

WHAT YOU NEED TO DO

1. Define priority levels and corresponding tags in your ticket system.
2. Automate priority assignment based on classification.

3. Add tags based on keywords or categories.

CHECK AT THE END

☐ Priority levels are defined.

☐ Automation for priorities is set up.

☐ Tags are correctly added.

RESULT

Tickets are equipped with priorities and tags.

4

Route to the right queue

Direct classified tickets to the corresponding support queues or teams to ensure efficient processing.

WHAT YOU NEED TO DO

1. Create various support queues based on departments.
2. Set up routing rules that assign tickets based on tags and priorities.
3. Test the routing with different ticket scenarios.

CHECK AT THE END

- ☐ Support queues are set up.
- ☐ Routing rules are configured.
- ☐ Routing works with test tickets.

RESULT

Tickets will be routed to the correct support queues.

LINKS

Slack API: <https://api.slack.com/>

5

Escalate critical issues

Escalate critical issues that require immediate attention by notifying management or specialized teams.

WHAT YOU NEED TO DO

1. Define criteria for critical issues.
2. Set up notifications in Slack for critical tickets.
3. Test escalation with simulated critical tickets.

CHECK AT THE END

- ☐ Criteria for critical issues are defined.
- ☐ Notifications in Slack are set up.
- ☐ Escalation works with test tickets.

RESULT

Critical tickets will be successfully escalated.

LINKS

Zendesk Escalation: <https://support.zendesk.com/hc/en-us/articles/360022363393-Escalating-tickets>

Recommended Tools & Resources

All tools in this workflow with their official website.

OpenAI API

<https://platform.openai.com/?ref=flowmatrix>

Official URL

Zendesk Alternatives

<https://www.zendesk.com/>

n8n

<https://n8n.io/?ref=flowmatrix>

Official URL

Slack

<https://slack.com/>

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