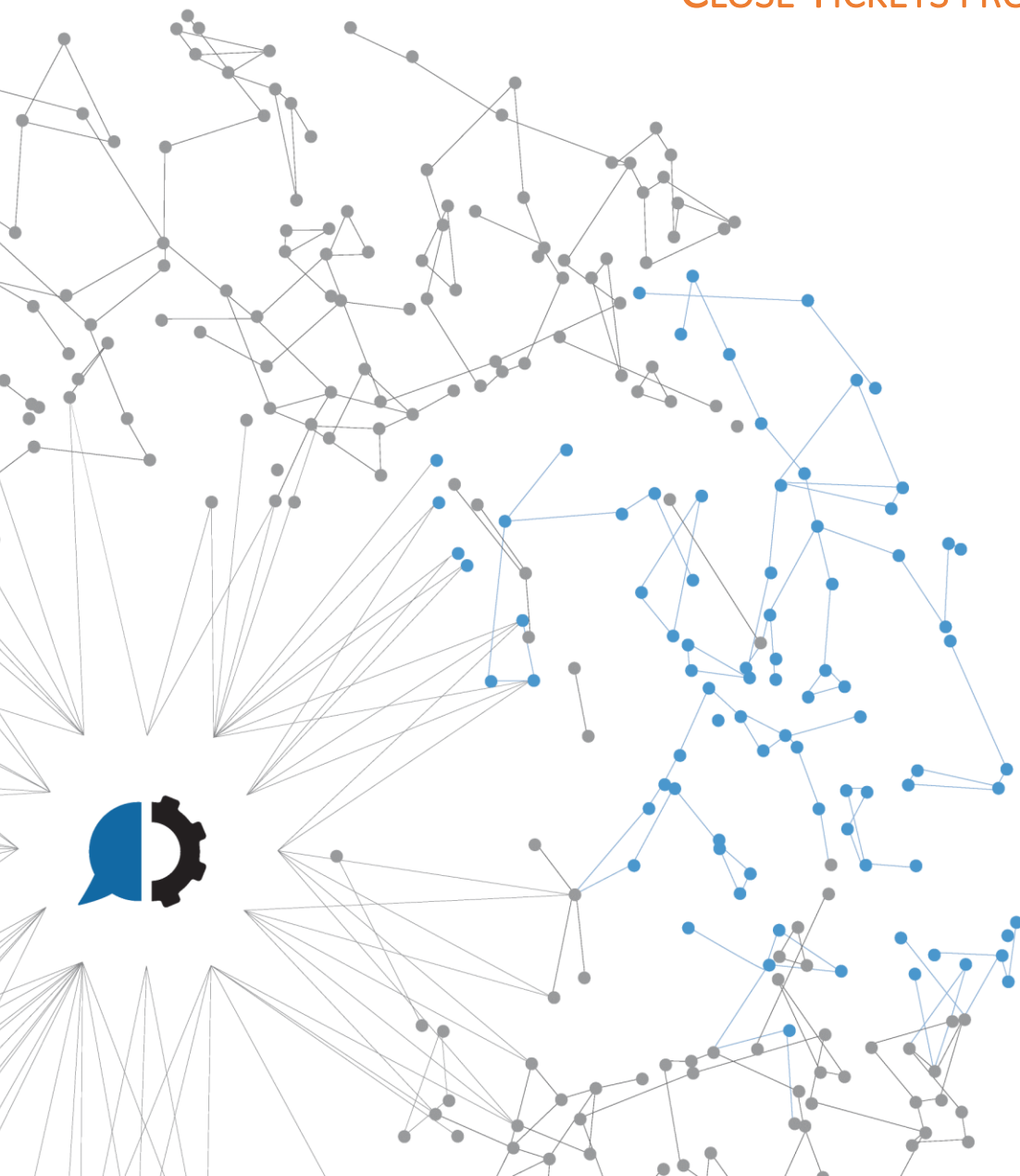




ZENDESK BOT

CLOSE TICKETS FROM EXCEL INPUT





Content

OVERVIEW	3
PREREQUISITES	4
HOW TO IMPORT AN AUTOMATE TASK	5
HOW TO GENERATE THE INPUT FILE	6
APPENDIX A – INPUT EXCEL EXAMPLE AND RESULT IN ZENDESK TICKETS VIEW	9
APPENDIX B - TROUBLESHOOTING	10



OVERVIEW

This how to guide introduces the *Zendesk Bot - Close Tickets from Excel INPUT*. Instead of spending precious time and resources on repetitive, manual tasks, let Automate go to work and streamline your IT and business processes with robotic process automation. With the help of Automate we can take over manual steps which greatly reduces the repetitive activities and improves the quality and consistency of the work. The top processes being Automated are reports generation, file movement, data import and export, and scheduling batch processing.

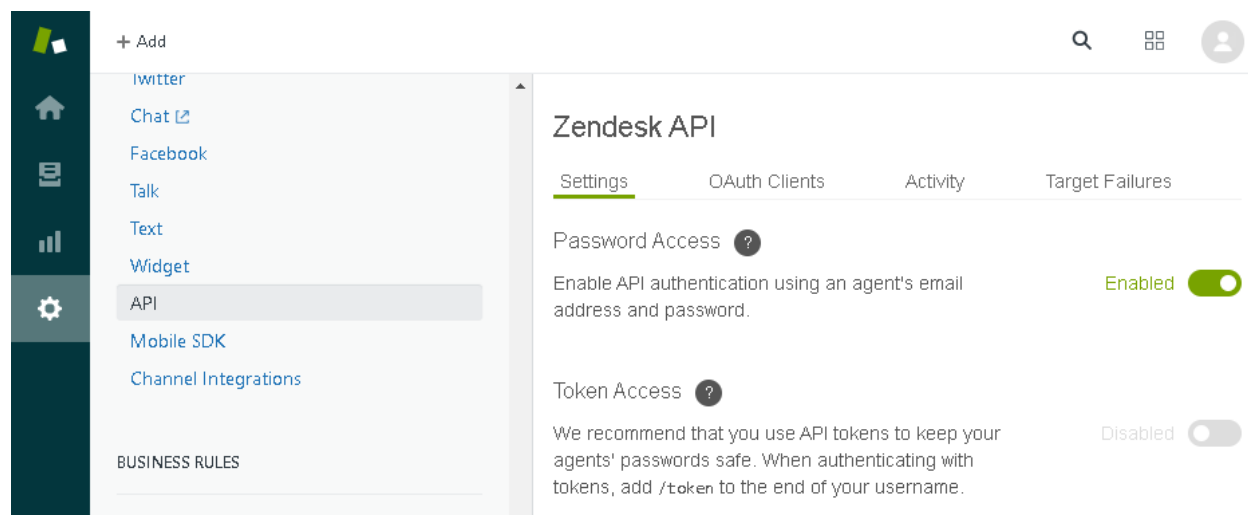
Zendesk Bot - Close Tickets from Excel INPUT is based in the Zendesk v2 REST API. It executes a ***tickets.json*** API request in order to create in Zendesk the tickets the specification provided in the Excel INPUT file provided with this Bot. You will be able to choose the status of the closed tickets. Possible values pending, solved, or closed. If Blank will be updated as solved.

You will find the details on attributes for the Tickets to be Closed in the [HOW TO GENERATE THE INPUT FILE](#) section.



PREREQUISITES

- **Automate:** The ZENDESK BOT depends on Automate software in order to work. The minimal supported versions are:
 - [Automate Ultimate 11.2](#)
 - [Automate Plus 11.2](#)
 - [Automate Desktop 11.2](#)
- **Automate Markup Language file (.AML):** The primary file type used in Automate which contains the steps of our Zendesk BOT task
- **Zendesk:** Our minimal requirements are
 - **Zendesk REST API – Enabled:** You can check the Zendesk documentation in this [link](#). This bot uses Basic Authentication. Make sure it is Enabled.



- **Service Now User account:** With the appropriate permissions to execute Zendesk Table API requests.
- **Automate constants to be created to set the Zendesk connection values:**
 - **const_ZendeskURL:** Zendesk URL for connection.
 - **const_ZendeskUserName:** Zendesk Login User Name.
 - **const_ZendeskUserPassword:** Zendesk Login User Password.

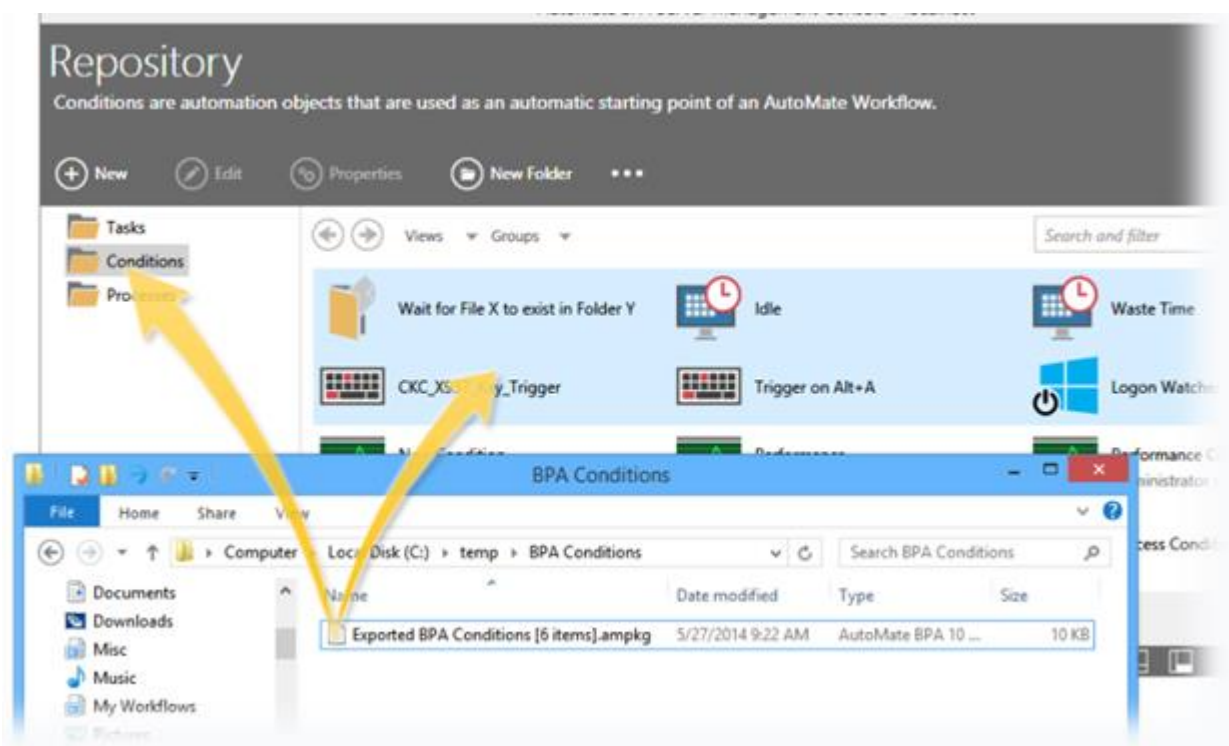


HOW TO IMPORT AN AUTOMATE TASK

Compatible file types can be imported to the repository via drag-and-drop

From the [Server Management Console](#), navigate to the Repository section

Drag the desired file(s) from its original location and drop them into the folder in the [SMC](#). Files can be dropped into the folder icon or the main panel (as shown below). Imported object(s) are automatically placed into their corresponding repository location.





HOW TO GENERATE THE INPUT FILE

The input file **“Zendesk Close Tickets INPUT.xlsx”** shipped with the Zendesk BOT provides a self-explanatory guide to complete all the fields in your transaction automatically.

The Excel INPUT file

A	B	C	D	E	F
Zendesk - Ticket Fields			Closed?	Result Details	
Ticket ID	Status (Possible values pending, solved, or closed. If Blank will be updated as solved)	Comment	Yes/No	Date	Incident Numer / Message

NOTES:

- **All fields** are mandatory.
- Columns D to F in the INPUT file will be filled with the result of the execution. See [APPENDIX A](#) for an example on the resulting.

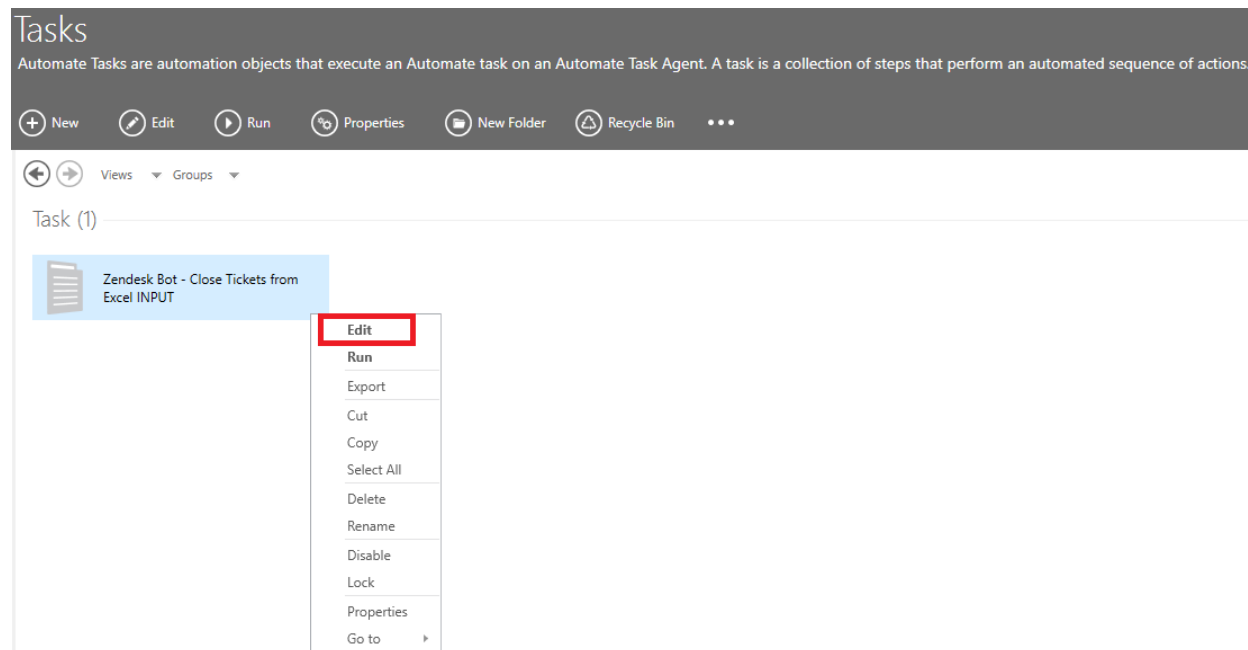


HOW TO EXECUTE THE ZENDESK BOT - CLOSE TICKETS FROM EXCEL INPUT

If this is the first time running this task, we will need to set some parameters

Close the [Server Management Console](#) and locate the imported task

Edit the imported task by right clicking on the task and selecting [edit](#)



In [step 4](#) edit the next variable according to you desired output:

- [var_ExcelInputFile](#): The path of the “**Zendesk Close Tickets INPUT.xlsx**” filed with the values for Tickets closing (e.g. C:\Automate\Tasks\ Zendesk Bot - Close Tickets from Excel INPUT\ Zendesk Close Tickets INPUT.xlsx).

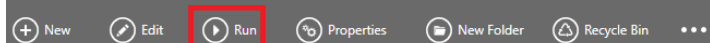
[Save and close](#) the task

Select the task and click on [Run](#)



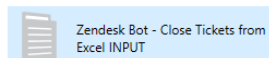
Tasks

Automate Tasks are automation objects that execute an Automate task on an Automate Task Agent. A task is a collection of steps that perform an automated sequence of actions.

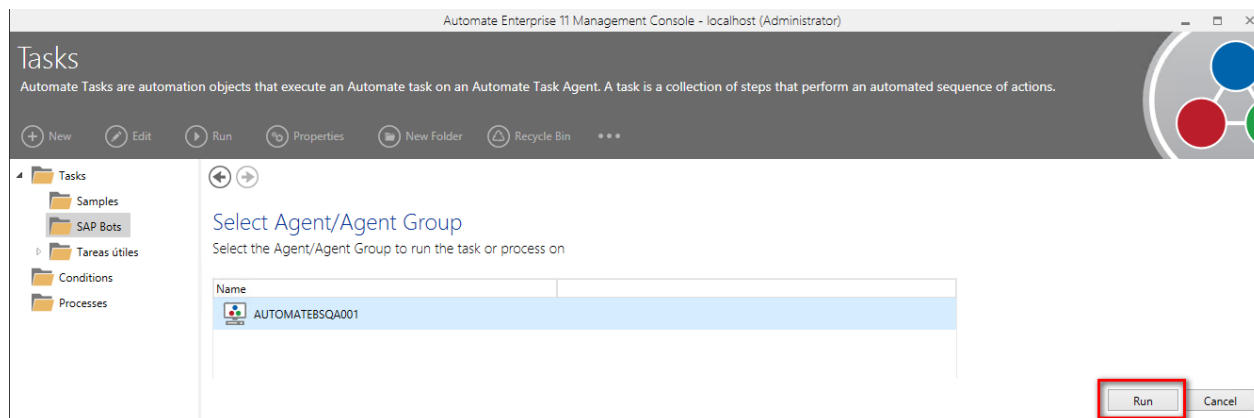


Views Groups

Task (1)



Select your [Agent](#) and click on [Run](#) again





APPENDIX A – INPUT EXCEL EXAMPLE AND RESULT IN ZENDESK TICKETS VIEW

For the next INPUT Excel file...

A	B	C	D	E	F
Zendesk - Ticket Fields			Closed?	Result Details	
Ticket ID	Status Possible values pending, solved, or closed. If Blank will be updated as solved	Comment	Yes/No	Date	Incident Numer / Message
7	solved	Closed by AutoMate	YES	28/02/2020 12:33:14 PM	The Ticket 7 was closed as solved.
8	solved	Closed by AutoMate	YES	28/02/2020 12:33:16 PM	The Ticket 8 was closed as solved.

Note that in the columns D to F the result of the execution will be written.

...the result in Zendesk will be:

+ Add

Views

Your unsolved tickets 0

Unassigned tickets 0

All unsolved tickets 0

Recently updated tickets 2

New tickets in your groups 0

Pending tickets 0

Recently solved tickets 2

Recently solved tickets

2 tickets

Play

	Subject	Requester	Requested	Solved	Priority	Group
Assignee:						
<input type="checkbox"/>	Automate Test 2		about 1 hour ago	20 minutes ago	Normal	Support
<input type="checkbox"/>	Automate Test 1		about 1 hour ago	20 minutes ago	Low	Support



APPENDIX B - TROUBLESHOOTING

- Logs: Each iteration of our BOT creates a Log file for troubleshooting. You can locate the log file under C:\Automate\Tasks\<<TASK NAME>>. By Default, the task name is *Zendesk Bot - Close Tickets from Excel INPUT*.



About HelpSystems

Organizations around the world rely on HelpSystems to make IT lives easier and keep business running smoothly. Our software and services monitor and AutoMate processes, encrypt and secure data, and provide easy access to the information people