Agent knowledge checklist

Tickets

☐ Add rich text formatting, images, videos, etc… to response	Basic
☐ View all ticket events	Basic (Power user)
☐ Add/generate discount code to response	Basic (Power user)
☐ Add Shopify product link to response	Basic (Power user)
☐ Add an internal note to a ticket	Lite
☐ Set ticket status to open/closed/snooze	Lite
☐ Change ticket subject	Lite
☐ Assign a user/team	Lite
☐ View customer ticket history	Lite
☐ Reply with different sender address	Lite
☐ Reply via different channel	Lite
☐ Set ticket fields	Lite

Ticket menu

☐ Mark ticket as spam	Basic
☐ Merge a ticket	Basic
☐ Mark ticket as unread	Basic
☐ Print a ticket	Basic
☐ Delete a ticket	Lead
☐ Snooze/unsnooze a ticket	Lite

Views

☐ Create a view/section	Basic
☐ Bulk action tickets	Basic
☐ Adjust view sharing status	Basic
☐ Edit view filters	Basic

Tags

☐ Sort tags by number of times used   Lead

☐ Search for tag   Lead

☐ Duplicate/delete a tag   Lead

☐ Merge multiple tags   Lead

☐ Create a tag   Lead

☐ Add/remove/create tag   Lite

Macros

☐ Export macros   Admin

☐ Import macros to create new macros   Admin

☐ Import macros to update existing macros   Admin

☐ Create a complex macro (including HTTP action)   Admin

☐ Search for macros by language/tag/name   Lead

☐ Sort macros by language/usage count/last update date   Lead

☐ Duplicate/delete macros   Lead

☐ Edit/manage macro   Lead

☐ Create a simple macro (no actions)   Lead

☐ Create a simple macro (including variables, tags and actions)   Lead

☐ Apply suggested macro   Lite

☐ Search/apply macro   Lite

Customers

☐ Merge customer   Basic

☐ Edit customer profile   Basic

☐ Search for a customer in ticket   Lite

☐ Set customer   Lite

☐ Create new customer   Basic

☐ Filter customers   Basic (Power user)

☐ Bulk delete customers   Lead

Rules

☐ View rules that have been applied to a ticket	Basic
☐ Enable/customize autoresponders from rule templates	Lead
☐ Check tickets that have been affected by a rule	Lead
☐ Install new rule from templates	Lead
☐ Rearrange rules in list	Lead
☐ Create a new custom rule (complex criteria, multiple actions)	Lead
☐ Enable/disable a rule	Lead
☐ Duplicate/delete an existing rule	Lead
☐ Create a new custom rule (basic criteria, single action)	Lead

General

☐ Filter audit logs by team member/object/event/date	Admin
☐ Submit product feedback	Basic
☐ Access help center, academy, webinars and community	Basic
☐ Access roadmap and status pages	Basic (Power user)
☐ Keyboard shortcuts	Basic (Power user)
☐ Access the homepage	Lead
☐ Use global search	Lite
☐ Contact Gorgias support via chat/email	Lite
☐ Set your own status in user menu	Lite

Widgets

☐ Customize widgets in sidebar	Admin
☐ Perform actions via widget (Shopify/BigCommerce only)	Basic
☐ Set up custom redirect link	Dev/engineer
☐ Set up custom button using API call	Dev/engineer

Statistics

☐ Download data	Admin
☐ Filter statistics by integration/channel/agent/tag/date	Lead