

FEBRUARY 2021

SymBot Admin Guide



Authorized Zendesk users can file and track support tickets, plus admins can add, remove, and list authorized Zendesk users through SymBot

Connect to SymBot

1. Search for "SymBot" in the Global Search Bar
2. SymBot will be listed as an external user
3. Send a connection request to the bot to automatically connect
4. SymBot will send you a message with guidance on how to leverage the bot
5. You are now ready to receive updates and use the admin support functionality!

SymBot 1h
Hello, @JadaSup Beasley, welcome back.
Click any of my commands:

	SELECTIONS	DESCRIPTIONS
<input type="button" value="SELECT"/>	Subscriptions	Sign up for recurring Symphony communications and manage preferences
<input type="button" value="SELECT"/>	Community	See firms and partners you can connect with on Symphony
<input type="button" value="SELECT"/>	History	Read SymBot's last three messages sent in this chat
<input type="button" value="SELECT"/>	Feedback	Help us improve your Symbot experience
<input type="button" value="SELECT"/>	Support	Learn tips & tricks, and answer questions
<input type="button" value="SELECT"/>	Admin Support	View and create tickets, manage authorized support contacts and more.

Need something different? Please ask your Symphony administrator.
Enter @SymBot whenever you need me.

SymBot Admin Functionality

Once you're connected to SymBot and have access to SymBot:

1. @mention SymBot for a list of commands
2. Select Admin Support to view and create tickets, manage authorized support contacts, and more

	SELECTIONS	DESCRIPTIONS
<input type="button" value="SELECT"/>	Create ticket	Create a ticket for Symphony's Support team
<input type="button" value="SELECT"/>	Manage users	See a list of all users associated with a client account, create new users or remove existing users
<input type="button" value="SELECT"/>	List all your tickets	List all service requests associated with your email
<input type="button" value="SELECT"/>	List all tickets	List all service requests associated with this organization

Commands

In a 1:1 chat with SymBot, @mention the bot for a list of commands:

Create a Ticket:

Create a ticket for Symphony Support

Manage Users:

See a list of all users associated with a client account, create new users or remove existing users

List all your Tickets:

List all service requests associated with your email

List all Tickets:

List all service requests associated with this organization