

# Agent knowledge checklist

## Tickets

- Views  Create a view/section
- Views  Edit view filters
- Views  Adjust view sharing status
- Views  Bulk action tickets
- Customer  Search for a customer in ticket
- Customer  Merge customer
- Customer  Set customer
- Customer  Edit customer profile
- Ticket  View all ticket events
- Ticket  Assign a user/team
- Ticket  View customer ticket history
- Ticket  Reply via different channel
- Ticket  Reply with different sender address
- Ticket  Change ticket subject
- Tags  Add/remove tag
- Macros  Search/apply macro
- Macros  Edit/manage macro
- Ticket menu  Snooze/unsnooze a ticket
- Ticket menu  Print/deleted/mark ticket as unread
- Widgets  Perform actions via Shopify widget
- Widgets  Customize widgets in sidebar
- User menu  Set agent status
- User menu  Access help center/keyboard shortcuts/latest updates
- General  Contact Gorgias support via chat

- Basic Agent
- Lead Agent
- Admin/Owner

## Customers

- Customers  Filter customers
- Customers  Bulk delete customers

## Statistics

- Statistics  Filter statistics by integration/channel/agent/tag/date

## Settings

- Profile  Enable macros to display in emails by default
- Profile  Edit your profile name/email/bio/picture/language/timezone
- Profile  Change your password
- Profile  [Access your API credentials](#)
- REST API  [Access/setup integrations](#)
- Integrations  [View/add new integrations](#)
- Tags  [Create/edit/delete a tag](#)
- Tags  [Merge multiple tags](#)
- Satisfaction  [Edit your satisfaction survey](#)
- Satisfaction  [Change the channel/timeframe for your survey](#)
- Billing & usage  [Update your billing details](#)
- Billing & usage  [View your usage](#)
- Self service  [Enable/disable self service](#)
- Self service  [Set/edit eligibility criteria for returns/cancelation/custom issues](#)
- Rules  [Create a new simple rule \(basic criteria, single action\)](#)
- Rules  [Duplicate an existing rule](#)
- Rules  [Enable/disable a rule](#)
- Rules  [Create a new complex rule \(complex criteria, multiple actions\)](#)
- Macros  [Create a simple macro \(no actions\)](#)
- Macros  [Create a complex macro \(including variables and actions\)](#)
- Users  [Create/delete a new user](#)
- Users  [Edit a users name/email/role](#)
- Users  [Resend new user invitation email](#)
- Teams  [Add new team](#)
- Teams  [Add/delete team members](#)
- Audit logs  [Filter audit logs by team member/object/event/date](#)
- Business hours  [Edit business hours/timezone](#)
- Assignment  [Setup assignment based on channel\(s\)](#)

## Integrations

- Email  [Set/edit email signature](#)
- Facebook  [Enable/disable channels](#)
- Chat  [Enable/disable chat channel](#)
- Chat  [Enable/customize quick replies/campaigns](#)