Cloud One BCS + Zendesk Integration Guide

Cloud One Business Communication Suite

Contents

About This Guide

Cloud One Business Communication Suite supports integration with Zendesk platform, so as to combine phone system with the customer support service. This integration allows Zendesk users to quickly get customers' profile and history, call details on Zendesk while dealing with customer phone calls using their PBX extensions; it can also implement automatic ticket creation based on customer phone calls, so as to streamline the workflow of Zendesk users. This topic describes the requirements, key features, and terminologies related with the integration.

Requirements

Zendesk

- **Zendesk Suite:** Suite Team, Suite Growth, Suite Professional, Suite Enterprise
- **ZendeskSupport only:** Support Team, Support Professional, Support Enterprise

PBX server

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 83.9.0.18 or later

Key features

The integration of Cloud One Business Communication Suite and Zendesk provides the following key features:

Click to Call

Users can launch calls by a single click on the detected numbers from Zendesk via Cloud One Simu Connect Web Client.

> **Note:** This feature requires users to install 'Cloud One Simu Connect for Google' Chrome extension and set up Simu Connect Web Client to work with the Chrome extension.

Call Popup

Automatically bring up the contact's profile on the web browser when users (with their Simu Connect Web Client or Simu Connect Desktop Client logged in) receive answer an inbound call from a Zendesk contact, or finish a call with a Zendesk contact. In addition, users are able to manually open the contact's profile from the call window during a call with a Helpdesk contact.

Contact Synchronization

Synchronize Zendesk contacts to an associated PBX phonebook when a user receives calls from or places calls to a Zendesk contact.

Automatic Contact Creation

A new contact will automatically be created in Zendesk for unknown inbound calls or outbound calls.

Automatic Ticket Creation

A new ticket will automatically be created in Zendesk for inbound calls or out bound calls.

Call Journal

Call activities will be logged automatically into the auto-created tickets, which are displayed on the details page of Zendesk contacts.

Call Recording Playback

Helpdesk users can see and play recordings stored in the PBX from corre sponding call log in Helpdesk interface.

Terminologies

The following table lists the terminologies of the Zendesk integration.

Term	Description
Support admin	An admin-level Zendesk support user.
Support agent	The Zendesk support users that are assigned tickets and interact with customers as needed to resolve support issues.
PBX extension	The extension number for Zendesk support user. The users can register the extension on a phone or on Simu Connect Clients, and use the extension to make and receive calls.
Ticket	Ticket is the support issues that are raised by customers and need to be resolved.
Customer	The end users who raise tickets in Zendesk.

Set up Zendesk Integration

Integrate Cloud One Business Communication Suite with Zendesk

This topic describes how to integrate Cloud One Business Communication Suite with Zendesk.

Requirements

Zendesk

- **Zendesk Suite:** Suite Team, Suite Growth, Suite Professional, Suite Enterprise
- **ZendeskSupport only:** Support Team, Support Professional, Support Enterprise

PBX server

•**Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
•**Firmware**: Version 83.9.0.18 or later

Prerequisites

•Make sure that the PBX can be remotely accessed via domain name.

•Your Zendesk account has administrator privileges in Zendesk support.

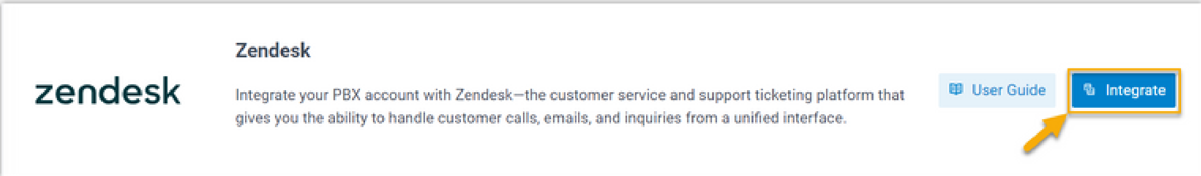
Procedure

•Step 1. Get authentication information from PBX
•Step 2. Register an application with Zendesk
•Step 3. Make authorization request to Zendesk •Step 4. Associate Zendesk users with PBX extensions

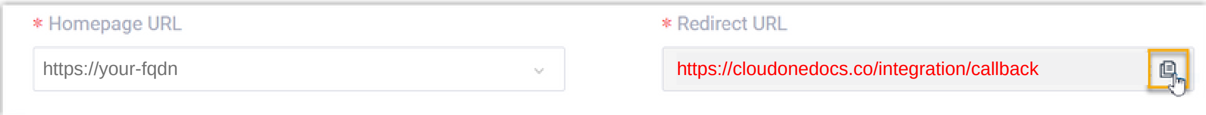
Step 1. Get authentication information from PBX

1.Log in to PBX web portal, go to **Integrations > Helpdesk.**

2.On the right side of Zendesk, click Integrate.



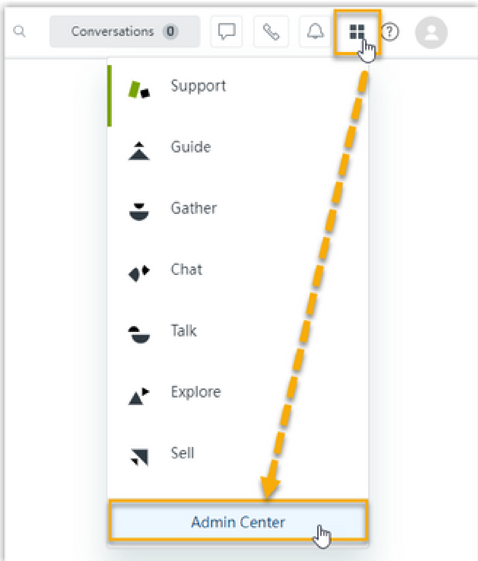
3.In the Network section, click to note down the redirect URL, as you will use it when registering an application with Zendesk.



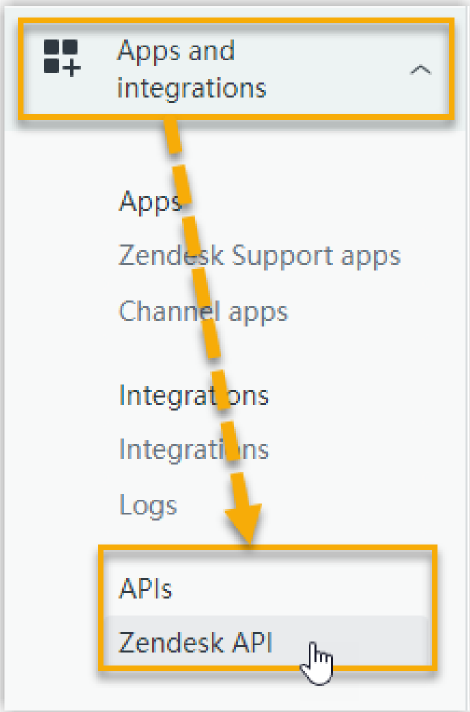
Step 2. Register an application with Zendesk

1.Log in to your Zendesk account.

2.On the top-right corner, click , then click **Admin Center**.

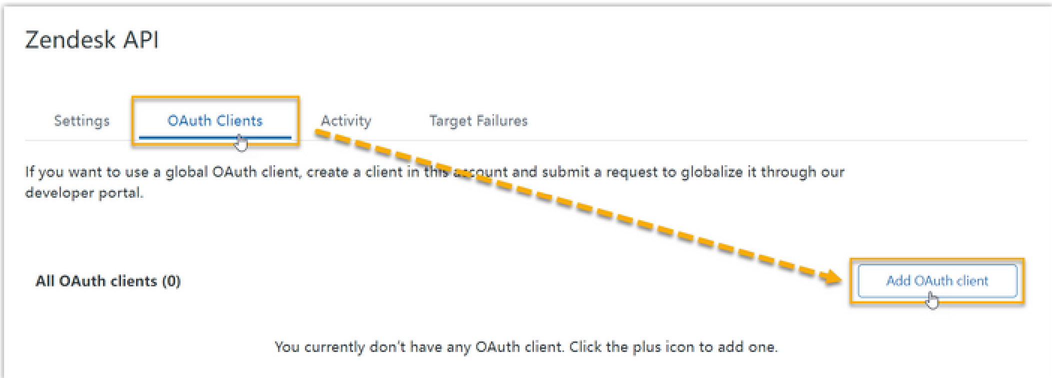


3.On the left navigation bar, go to **Apps and integrations > APIs > Zendesk API**.

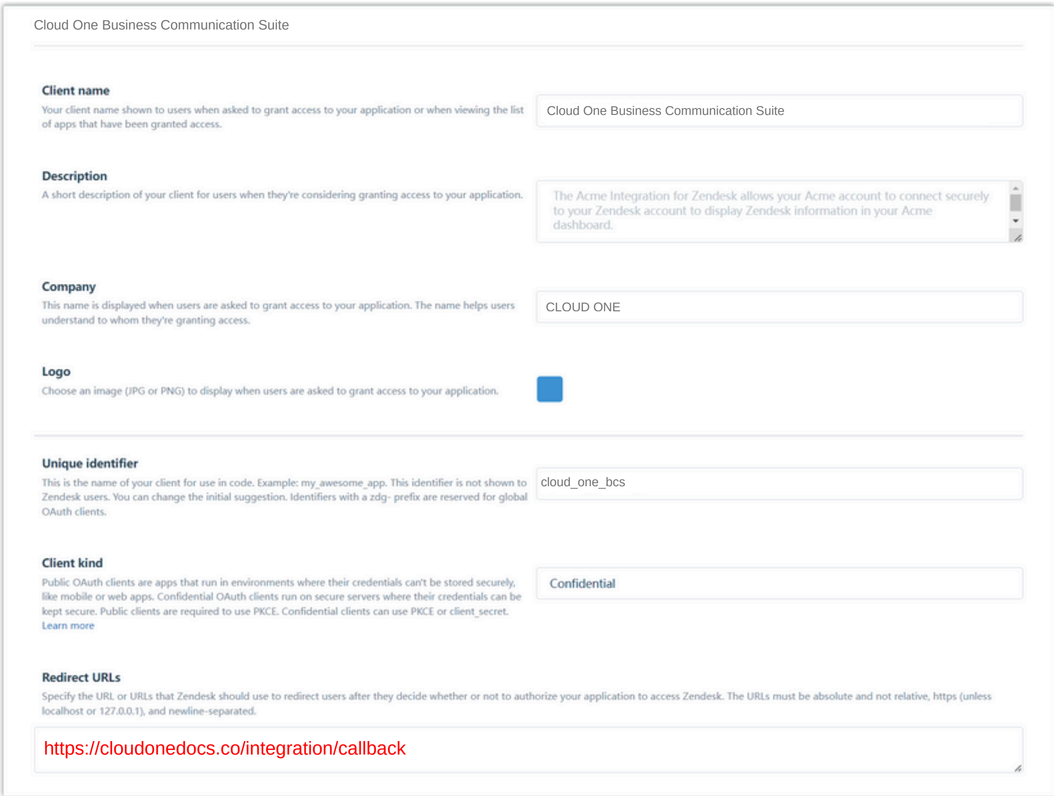


4. On the **Zendesk API** page, create an application.

   a. Go to the **OAuth Clients** tab, then click **Add OAuth client**.



   b. On the configuration page, complete the following settings.



Client name: Specify a name to help you identify it.

Description :Optional. Set a short description for the application.

Company :Optional. Set the company name for the application.

This field is auto-populated with your organization's name

Logo: Optional. Set a logo for the application.

Unique identifier : The field is auto-populated with a reformatted version of **Client name.**

> **Note:** Note down the unique identifier as you will need it later.

c. Click

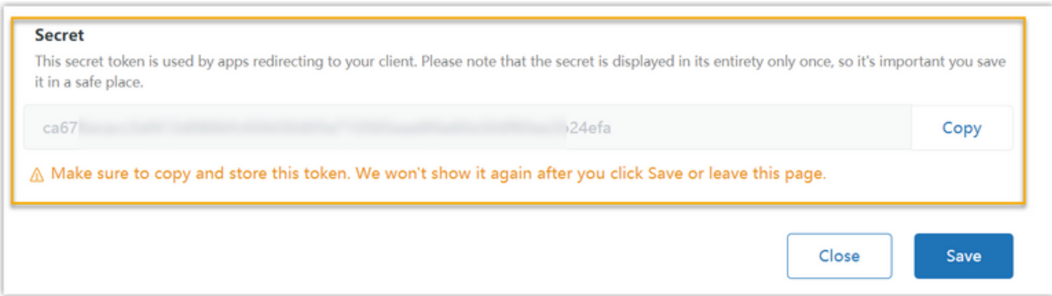
Client kind: Select **Confidential**.

Redirect URLs: Paste the redirect URL obtained from the PBX.

Save.

d. In the pop-up window, click **OK**.

After the page refreshes, a **Secret** field appears on the lower side, displaying the secret of the application.

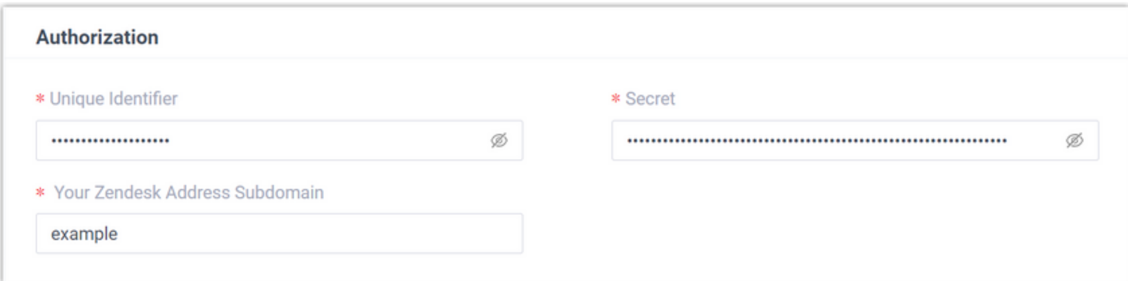


e. Click **Copy** and note down the secret.

> **Important:** Make sure that you copy and properly store the secret before you leave the current web page, as the secret only displays once. Otherwise you will have to re-generate a new one.

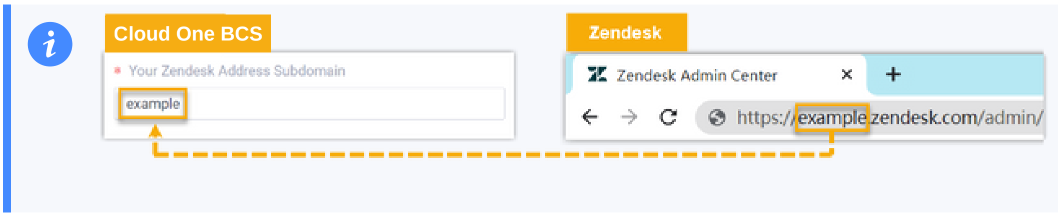
Step 3. Make authorization request to Zendesk

1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the right side of **Zendesk**, click **Integrate**.
3. In the **Authorization** section, fill in the following information.



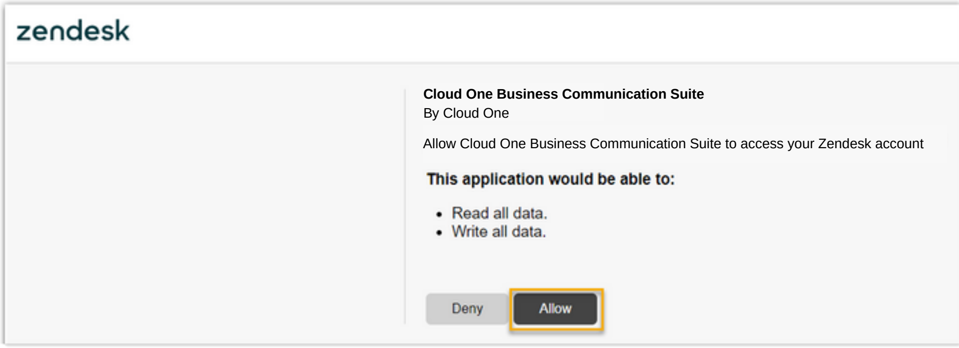
Unique Identifier: Paste the unique identifier of the Zendesk application.
Secret: Paste the secret of the Zendesk application
Your Zendesk Address Subdomain: Enter your Zendesk subdomain.

> **Tip:**
> You can get the subdomain from your Zendesk account's URL `https://subdomain.zendesk.com`



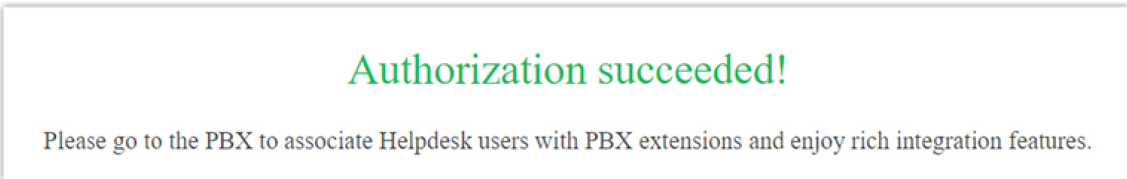
4. Click **Save**

A new browser web page will be launched, indicating that the Zendesk application requests to access data in your Zendesk account.

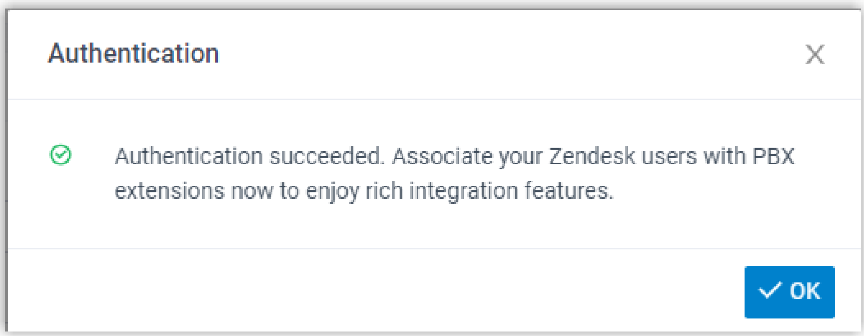


5.Click **Allow** to proceed.

If the authorization succeeds, the web page will display "Authorization succeeded!".

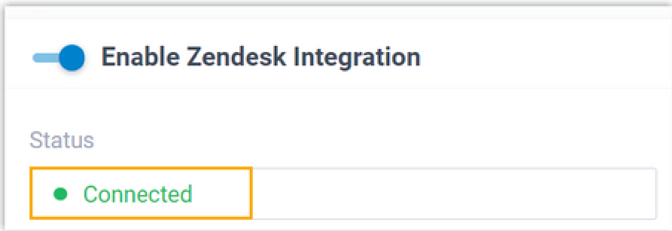


On the PBX configuration page, a pop-up window displays the integration authentica tion result.



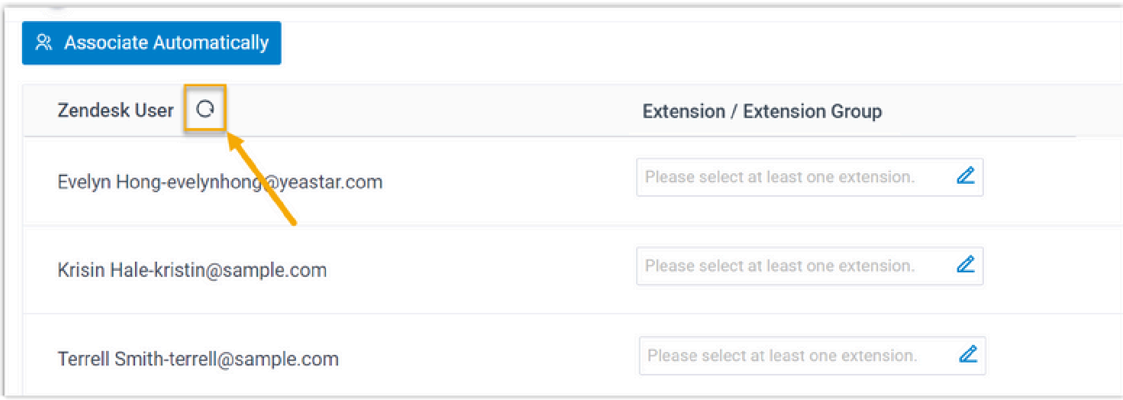
6.Click **OK**to confirm.

The Status field displays Connected, indicating that Cloud One Business Communication Suite is connected to Zendesk successfully.



Step 4. Associate Zendesk users with PBX extensions

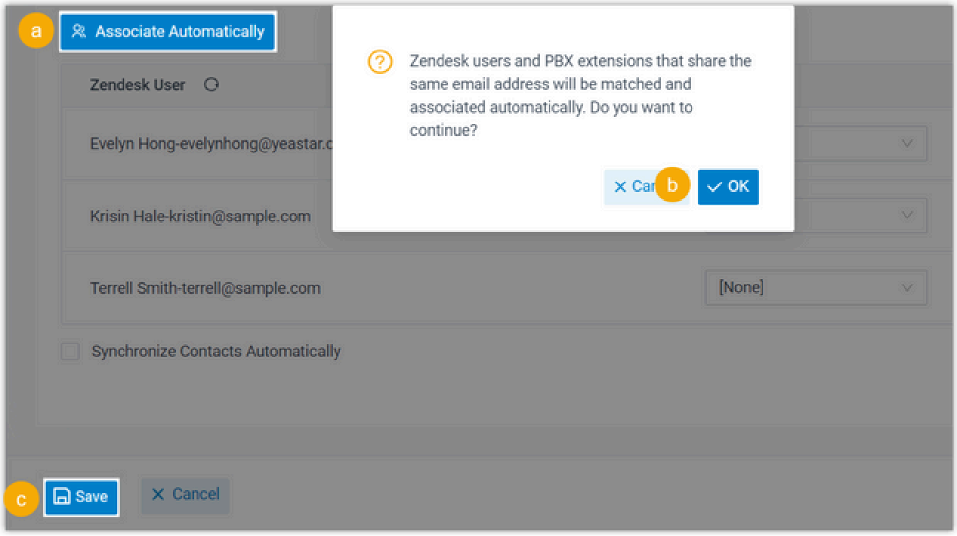
1. On the Zendesk integration page of the PBX, click beside Zendesk User to obtain the latest list of Zendesk users.



2.Associate the Zendesk users with PBX extensions.

Associate automatically

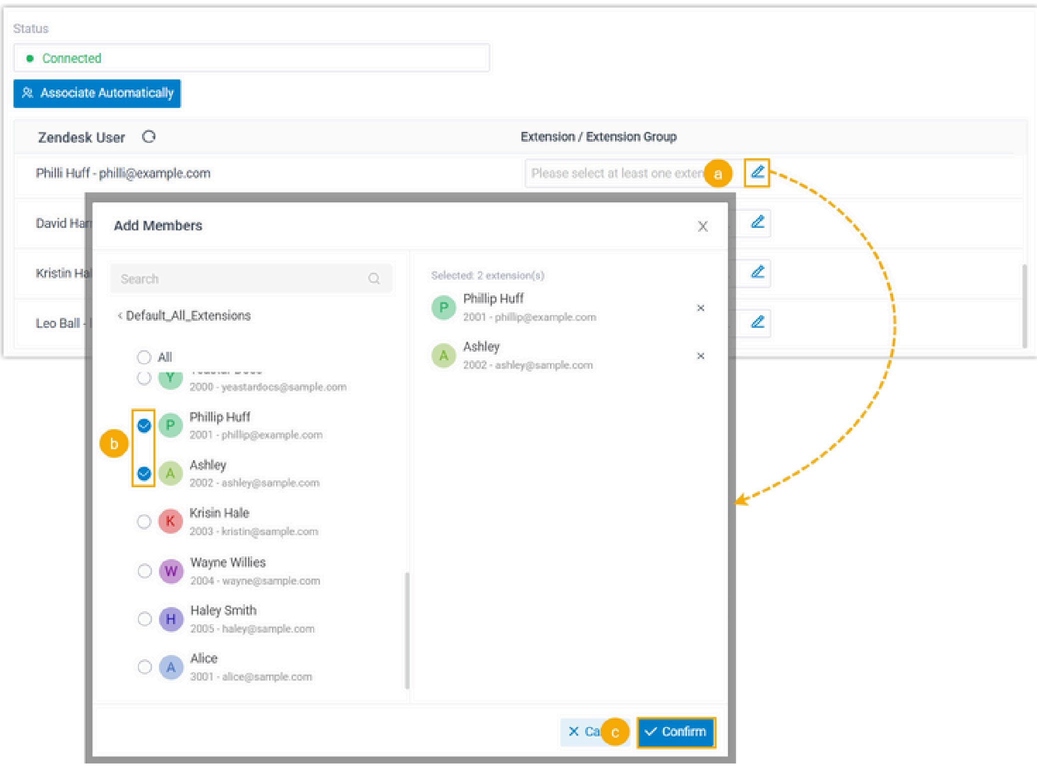
If users bind the same email address to their Zendesk accounts and PBX extensions, you can implement automatic association of their Zen desk accounts and PBX extensions.



a. Click Associate Automatically.
b. On the pop-up window, click **OK**.
c. Click **Save.**

Associate manually

If a user binds different email addresses to his or her Zendesk account and PBX extension, you need to manually associate the user's Zendesk account and PBX extension.



a. In the Extension / Extension Group field beside the Zendesk user, click

b. In the pop-up window, select the desired user's extension(s).

c. Click **Confirm**

d. Click **Save**

Result

- The integration of Cloud One Business Communication Suite and Zendesk is set up.
- Associated Zendesk users can make or receive calls with their PBX extensions.

Set up Contact Synchronization from Zendesk

After integrating Cloud One Business Communication Suite with Zendesk, you can enable a one-way contact synchronization to synchronize the Zendesk contacts to a specific PBX phonebook.

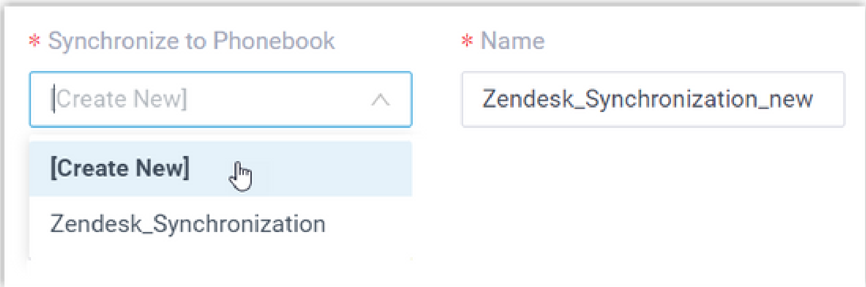
Prerequisites

You have integrated Cloud One Business Communication Suite with Zendesk.

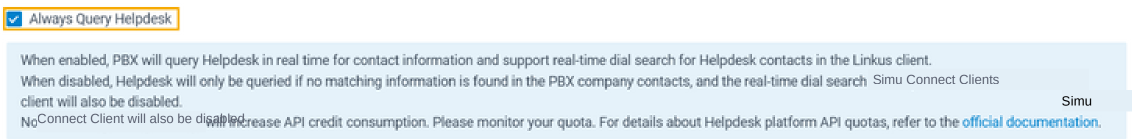
Procedure

1. Log in to PBX web portal, go to Integrations > Helpdesk.
2. On the Zendesk integration page, turn on **Synchronize Contacts Automatically.**
3. **In the Synchronize to Phonebook** drop-down list, select an existing empty phone book or create a new phonebook to store the contacts that will be synchronized from Zendesk

Note: The contacts can only be synchronized to an empty phonebook.



4. On the Always Query Helpdesk option, decide whether to search contacts in the Helpdesk real-time.



• If enabled, PBX will query the Helpdesk in real time for contact information, and support real-time dial search for Helpdesk contacts in the Simu Connect clients of the as sociated extension users.

• If disabled, PBX will only query Helpdesk when there is no matching information found in the PBX company contacts.

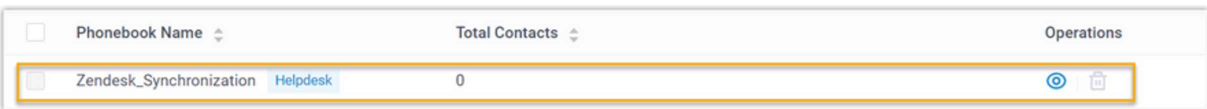
Note:

- Enabling this feature will increase API usage, so make sure to monitor your quota accordingly.
- The real-time search is not supported when masked number is enabled.

5. Click **Save**

Result

On **Contacts > Phonebooks**, the associated phonebook comes with a label Helpdesk



When the associated extension receives an inbound call from or places an outbound call to a Zendesk contact, the matched contact information will be synchronized to the phonebook in Cloud One Business Communication Suite automatically.

Note: This is a one-way sync from Zendesk to Cloud One Business Communication Suite , therefore the associated phonebook and the synced contacts are read-only.

Troubleshooting: Fail to synchronize certain contacts?
Incomplete information of contacts can lead to synchronization failure. Make sure the following fields are filled in for the contacts, then perform the directory synchronization again:

- Either the **First name** or **Last name** field is filled in.
- At least one phone number-related field is filled in.

Set up Contact Creation for Zendesk

After integrating Cloud One Business Communication Suite with Zendesk, you can enable automatic or manual contact creation. This feature helps Zendesk users build their contact database, ensuring that all contacts are captured when unknown calls are received or placed in Zen desk.

Prerequisites

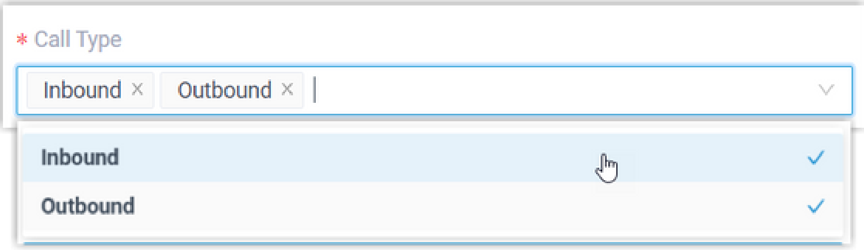
You have integrated Cloud One Business Communication Suite with Zendesk.

Procedure

1. Log in to PBX web portal, go to Integrations > Helpdesk.
2. On the Zendesk integration page, turn on Create New Contact.
3. In the **Create Method** section, select the desired creation method according to your needs.
   • If you want the system to automatically create contacts in the Helpdesk based on specified types of calls, do as follows

a. Select **Automatically.**

b. In the **Call Type** drop-down list, select when will a contact be automatical ly created in the Helpdesk.



Inbound: Inbound call from an unknown number that doesn't match a Contact, Lead, or account already in the Helpdesk.

Outbound: Outbound call to an unknown number that doesn't match a Contact, Lead, or account already in the Helpdesk.

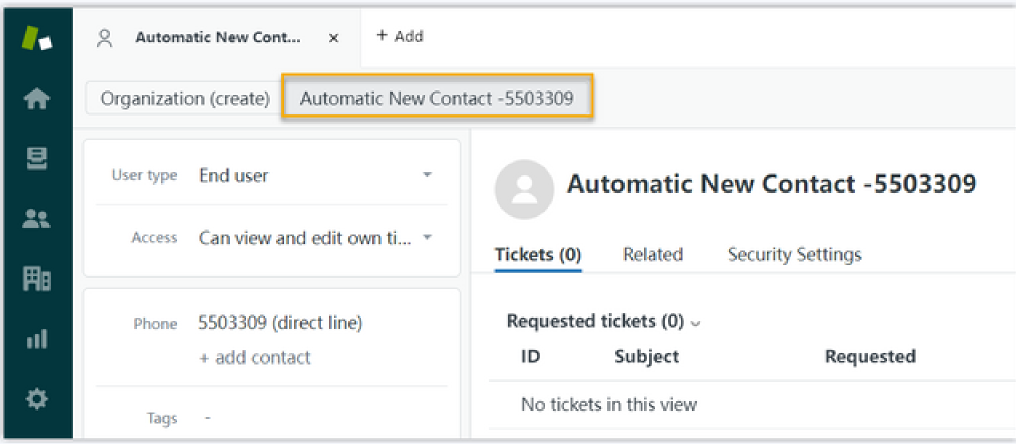
• If you want to allow associated extension users to manually create contacts in the Helpdesk during a call, select Manually

4.Click **Save**

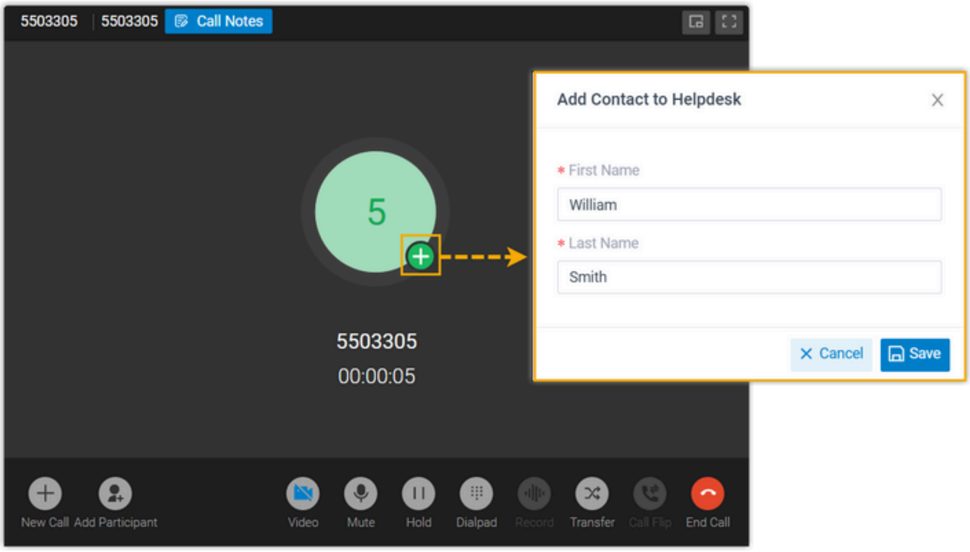
Result

•If automatic creation is configured, when a call is placed to an unknown number or a call is received from an unknown number, a new contact is created in Zendesk.

> **Note:**
> The name of an auto-created contact has a prefix of `Automatic New Contact` followed by the number.



If manual creation is configured, the associated extension users can manually add an unknown number as a new contact or lead on the Helpdesk.



Note: If the Contact Synchronization feature is enabled, the new created contact will also be synchronized to the associated phonebook in Cloud One Business Communication Suite .

Set up Automatic Ticket Creation for Zendesk

After integrating Cloud One Business Communication Suite with Zendesk, you can set up automatic ticket creation for Zendesk contacts, so as to automatically convert inbound calls and out bound calls into support tickets.

Prerequisites

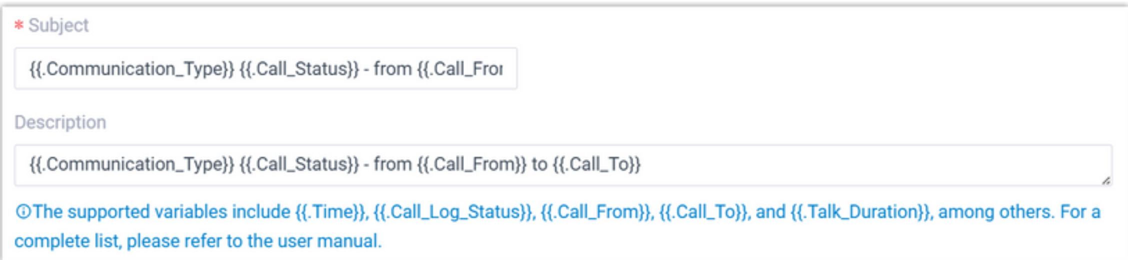
You have integrated Cloud One Business Communication Suite with Zendesk.

Procedure

1. Log in to PBX web portal, go to **Integrations > Helpdesk.**
2. On the Zendesk integration page, turn on **Create New Ticket Automatically.**
3. Set up the time point and call type(s) of automatic ticket creation

When to Create a New Ticket	Description
Before the Call	A ticket will be created in Zendesk when the Zendesk user receives an inbound call or places an outbound call to a Zendesk contact. In the The Type of Call to Create Ticket drop-down list, select specific call type(s) based on which a new ticket will be created **Inbound**: Inbound calls. **Outbound**: Outbound calls.
After the Call	A ticket will be created in Zendesk when the user ends the call with a Zendesk contact. In the The Type of Call to Create Ticket drop-down list, select specific call type(s) based on which a new ticket will be created. **Inbound Answered**: Inbound calls that are answered. **Inbound No Answer**: Inbound calls that are missed. **Outbound Answered**: Outbound calls that are answered. Outbound No Answer: Outbound calls that are not answered.

4. Configure the following ticket information according to your needs.



A ticket will be created in Zendesk when the user ends the call with a Zendesk contact.

Subject : The subject of the ticket.
Description : The description of the ticket.

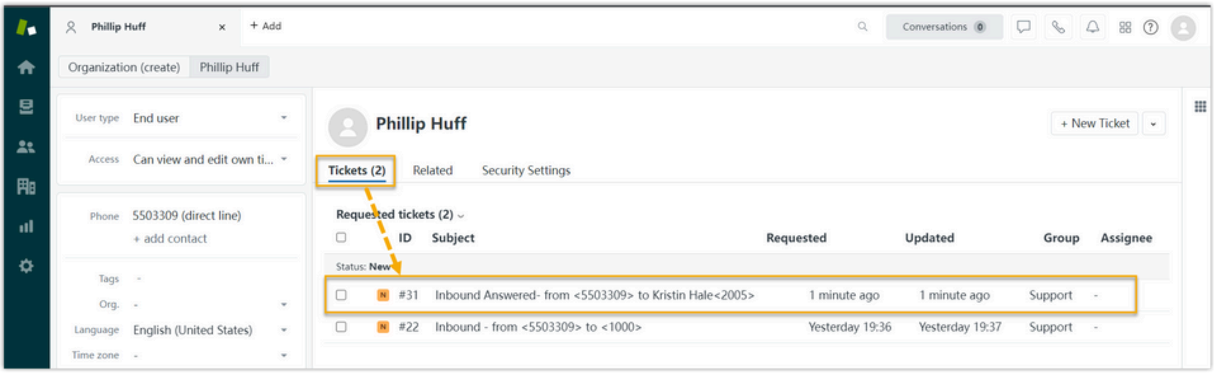
Note: The contents can be composed of variables.

5. Click **Save**

Result

New tickets will be created for existing Zendesk contacts automatically based on the specified call types. Users can check the auto-created tickets on the details page of the Zendesk contacts.

> **Note:** If you have set up automatic contact creation for Zendesk, the system also creates new tickets for unknown inbound or outbound calls.



Set up Call Popup

After the integration with Zendesk, a web browser tab displaying the Zendesk contacts information will be automatically launched when a Zendesk user receives an inbound call from a Zendesk contact by default. You can also configure the call popup to be triggered when a call is answered or ended as needed.

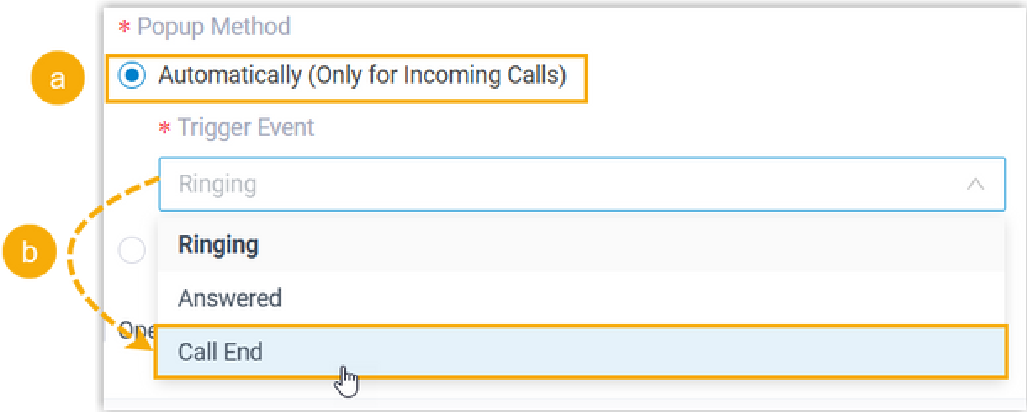
Prerequisites

You have integrated Cloud One Business Communication Suite with Zendesk.

Procedure

1.Log in to PBX web portal, go to **Extension and Trunk > Extension.**
2. Click to edit the extension associated with a Helpdesk user.
3. In the Simu Connect Clients tab, scroll down to your desired Simu Connect client, then select the checkbox of Open Contact URL Using System-Integrated Helpdesk.
4. In the Popup Method section, decide the method of call popup

•If you want the system to automatically open the Helpdesk contact details page, do as follows:



a. Select **Automatically (Only for Incoming Calls).**

b. In the **Trigger Event** drop-down list, set when the call popup will be automatically triggered.

◦ **Ringing:** A call popup will be triggered when a user receives an in bound call from a Helpdesk contact.

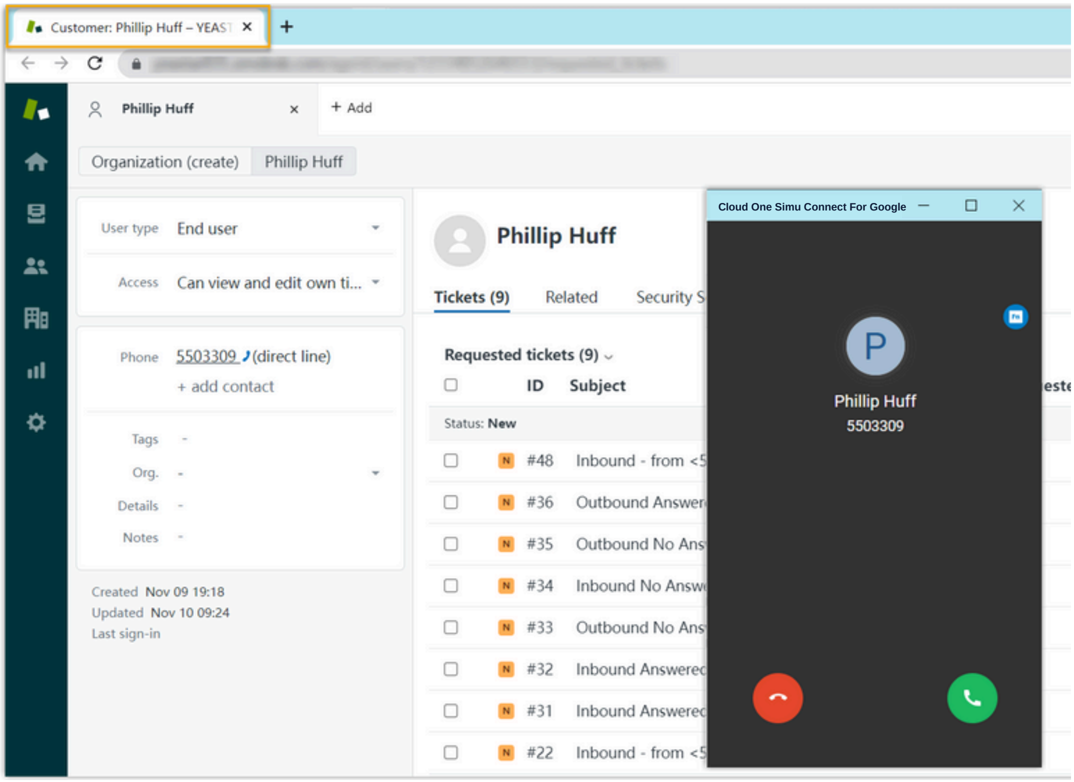
◦ **Answered**: A call popup will be triggered when a user answers an inbound call from a Helpdesk contact.

◦ **Call End**: A call popup will be triggered when a user finishes a call with a Helpdesk contact. • If you want the associated extension user to manually open the contact's URL during a call with a CRM contact, select Manually.

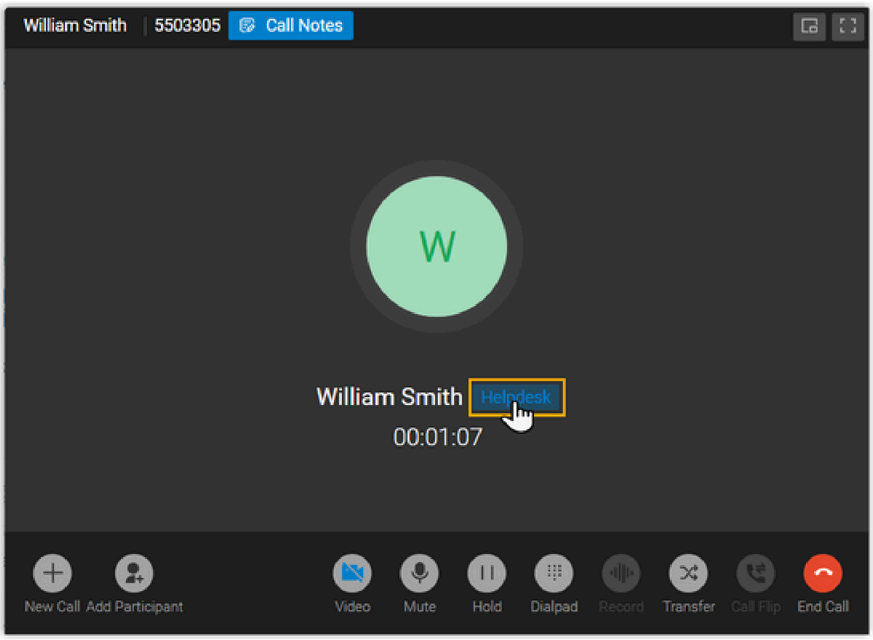
5. Click **Save.**

If you want the associated extension user to manually open the contact's URL during a call with a CRM contact, select **Manually.**

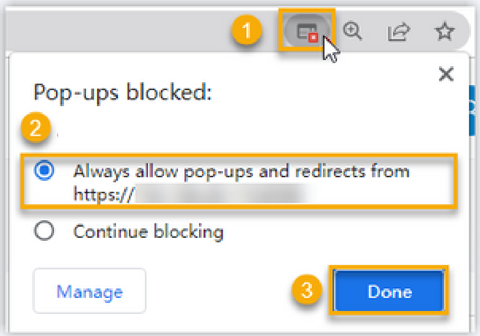
• If automatic call popup is configured, when the specified trigger event occurs on an inbound call from a Zendesk contact, a new browser tab will be launched to show the contact's information from the Zendesk



If manual call popup is configured, the associated extension users can click the CRM label on the call window to manually open the contact's details page during a call with the CRM contact



> **Note:**
> The pop-up web page might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, then click **Done**



Enable Call Recording Playback in Zendesk

After the integration, call logs can be automatically synchronized to Zendesk when an as sociated user ends calls with Helpdesk contacts. You can set up to enable playing the call recordings of the corresponding call logs directly within Zendesk.

Prerequisites

•You have integrated Cloud One Business Communication Suite with Zendesk.
•You have Set up Automatic Ticket Creation for Zendesk.

Procedure

1. Log in to PBX web portal, go to **Integration > Helpdesk.**
2. On the Helpdesk integration page, scroll down to **Call Journal.**
3. Select the checkbox of **Play Call Recording**. If enabled, the Helpdesk users who associated with extensions on PBX can directly view and play call recordings stored on the PBX within the Helpdesk system.

> **Note:** When users click to play call recording in the Helpdesk, the system will re quest recording file from the PBX. For details on how the Helpdesk platform protects the privacy of recording data, please contact Helpdesk provider.

4. Click **Save**

Result

The Helpdesk users who associated with extensions on PBX can directly view and play recordings in the Helpdesk.

Use Zendesk Integration

This topic shows the usage of the key features that can be achieved after integrating Yeast ar P-Series Software Edition with Zendesk.

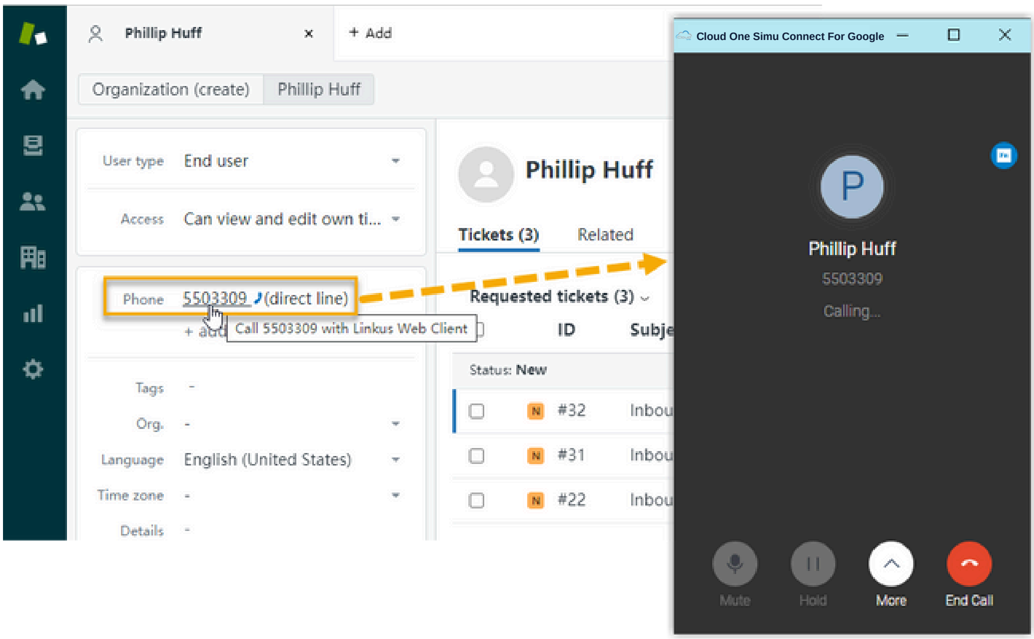
Click to Call

Prerequisites

Install Cloud One Simu Connect for Google Chrome extension and set up Simu Connect Web Client to work with the Chrome extension.

Procedure

Users can click on detected numbers on the Zendesk web page, a call is then sent out directly via a PBX extension.



Call Popup

Prerequisites

Keep at least one of the following clients logged in:

• Simu Connect Desktop Client

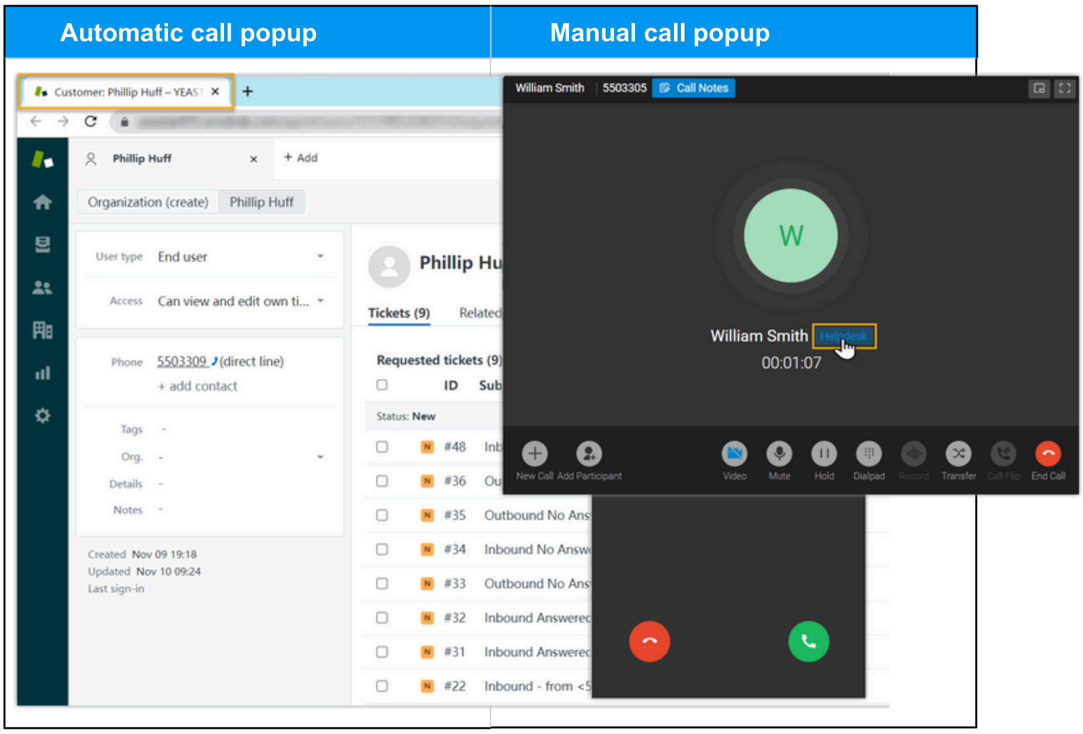
• Simu Connect Web Client

> **Note:**
> If users close web browser or Simu Connect Web Client tab, they can NOT receive calls. To avoid this, users can install Chrome extension Cloud One Simu Connect for Google, which allows for the call pop- up browser tab even when web browser is closed.

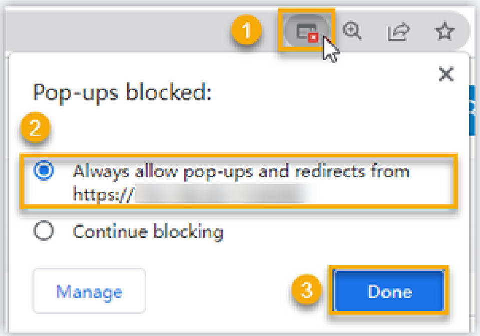
Procedure

When Zendesk users receive / answer an inbound call from a Zendesk con tact, or finish a call with a Zendesk contact, a new browser tab will automatically be launched to show the Zendesk contact's information. Additionally, users can manually open the contact's information from the call window during the call.

> **Note:**
> For more information about the settings, see Set up Call Popup.

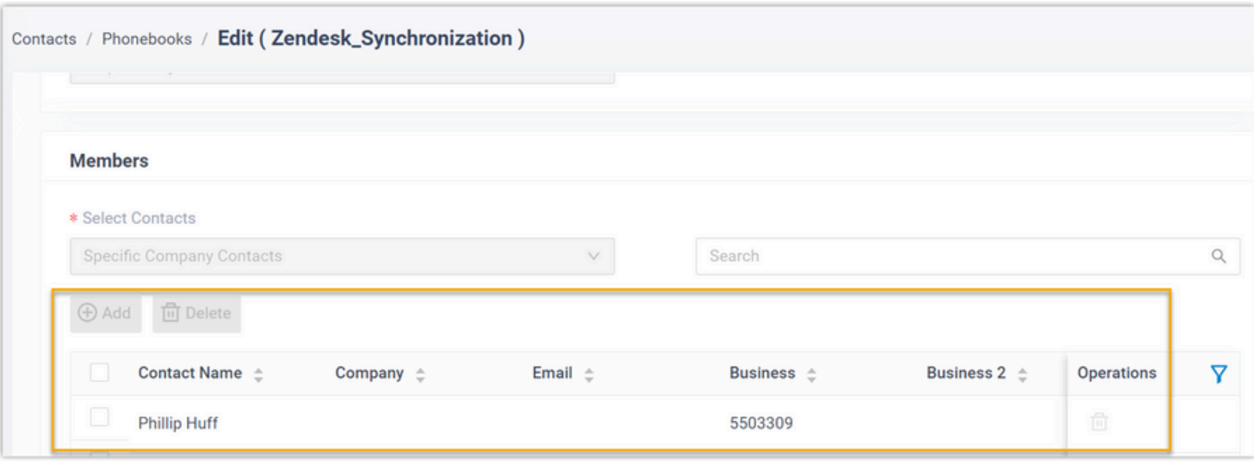


The pop-up window might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click **Done**.



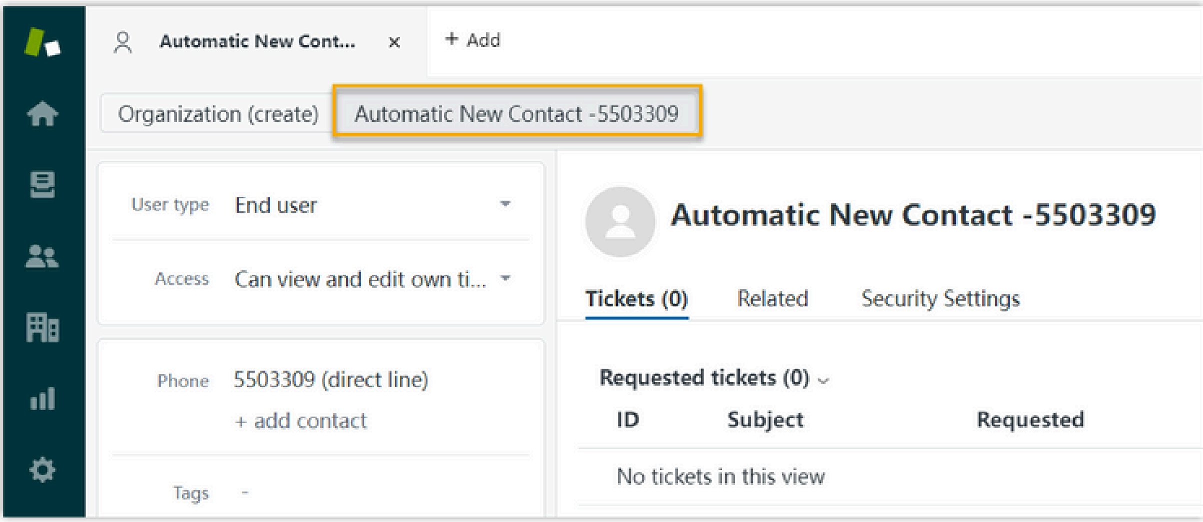
Contact Synchronization

Inbound calls and outbound calls will trigger a Zendesk contact lookup. If there exists the same number in Zendesk, the matched Zendesk contact will be synchronized to the associated PBX phonebook, and the synchronized contact is read-only on PBX.



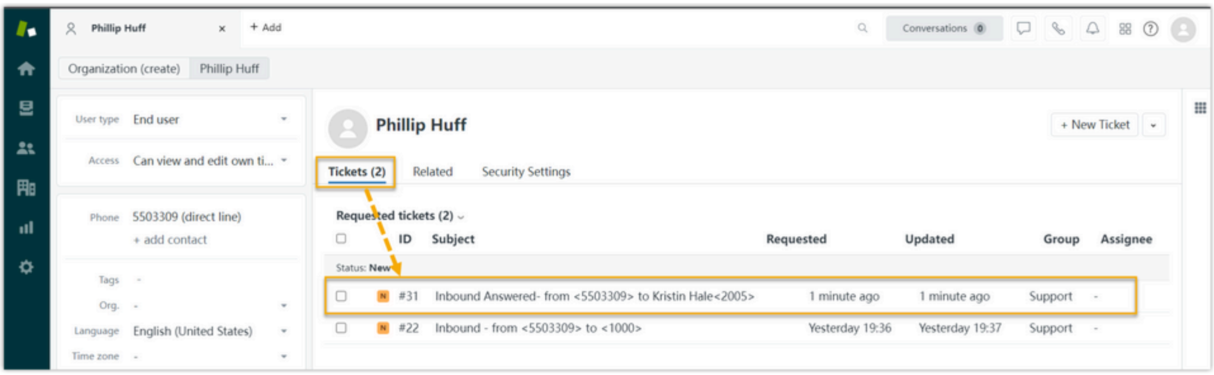
Contact Creation

A new contact can be created automatically or manually in Zendesk when the associated extensions call or receive calls from an unknown number.



Automatic Ticket Creation

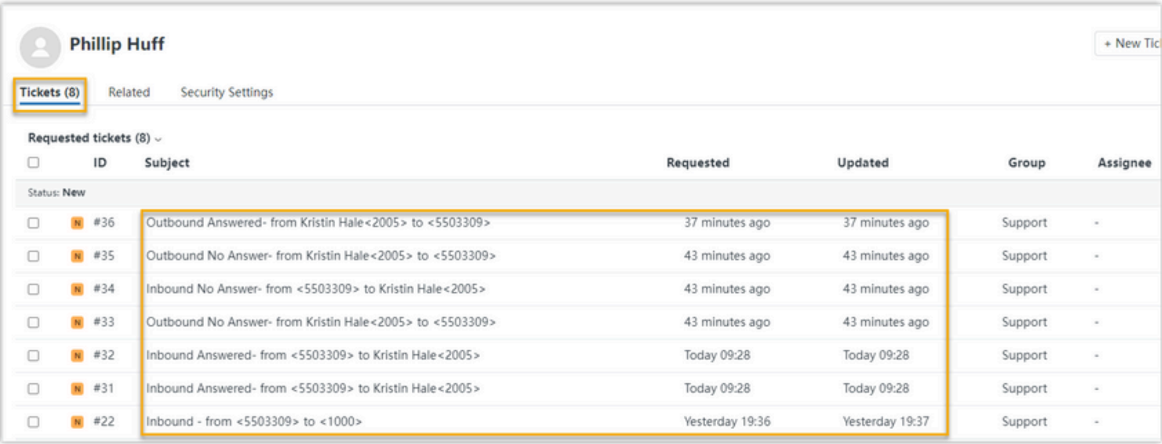
When the extension associated with a Zendesk user receives an inbound call from, or places an outbound call to a Zendesk contact, a new ticket will be created automatically in the details page of the contact.



Call Journal

> **Note:** The feature is supported only if you have set up automatic ticket creation for Zendesk.

If you enable automatic ticket creation, the records of the specified types of calls (outbound calls, inbound calls, and missed calls) will be logged into the auto-created tickets, which are displayed in the details page of Zendesk contacts.

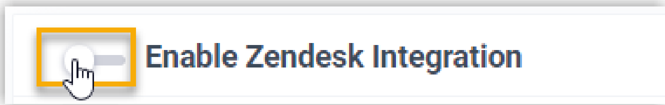


Disable Zendesk Integration

You can disable the Zendesk integration on Yeastar P-Series Software Edition at any time when you want to pause the integration.

Procedure

1. Log in to PBX web portal, go to Integrations > Helpdesk.
2. On the top of the Zendesk integration page, turn off the switch.



3. Click Save

Result

• The Status field displays Disabled.

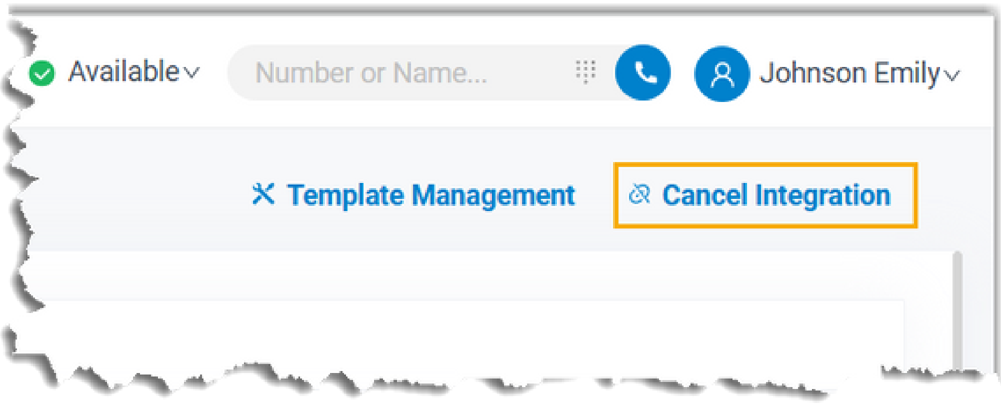
• The Zendesk integration configurations are retained, and can be used directly the next time it is enabled

Disconnect Zendesk Integration

When you want to integrate with another helpdesk service, you need to disconnect the cur rent Zendesk integration first.

Procedure

1. Log in to PBX web portal, go to Integrations > Helpdesk.
2. At the top-right corner, click Cancel Integration.



3. On the pop-up window, click **OK**

Result

The Zendesk integration is disconnected.
All the integration settings are cleared.
The synchronized phonebook and contacts are retained on PBX, and can be edited now