Zendesk Integration Guide

Yeastar P-Series Cloud Edition

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Contents

About This Guide

Yeastar P-Series Cloud Edition supports to integrate with Zendesk platform, so as to combine phone system with the customer support service. The 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
- **Zendesk Support only**: Support Team, Support Professional, Support Enterprise

PBX server

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 84.9.0.18 or later

Key features

The integration of Yeastar P-Series Cloud Edition 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 Yeastar Linkus Web Client.

> **Note:**
> This feature requires users to install 'Yeastar Linkus for Google' Chrome extension and set up Linkus 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 Linkus Web Client or Linkus 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 outbound 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 corresponding 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 Linkus 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.

Related information

- Integrate Yeastar P-Series Cloud Edition with Zendesk
- Set up Contact Synchronization from Zendesk
- Set up Contact Creation for Zendesk
- Set up Automatic Ticket Creation for Zendesk
- Set up Call Popup
- Use Zendesk Integration
- Disable Zendesk Integration
- Disconnect Zendesk Integration

Set up Zendesk Integration

Integrate Yeastar P-Series Cloud Edition with Zendesk

This topic describes how to integrate Yeastar P-Series Cloud Edition with Zendesk.

Requirements

Zendesk

- **Zendesk Suite**: Suite Team, Suite Growth, Suite Professional, Suite Enterprise

- **Zendesk Support only**: Support Team, Support Professional, Support Enterprise

PBX server

- **Plan**: Enterprise Plan (EP) or Ultimate Plan (UP)
- **Firmware**: Version 84.9.0.18 or later

Prerequisites

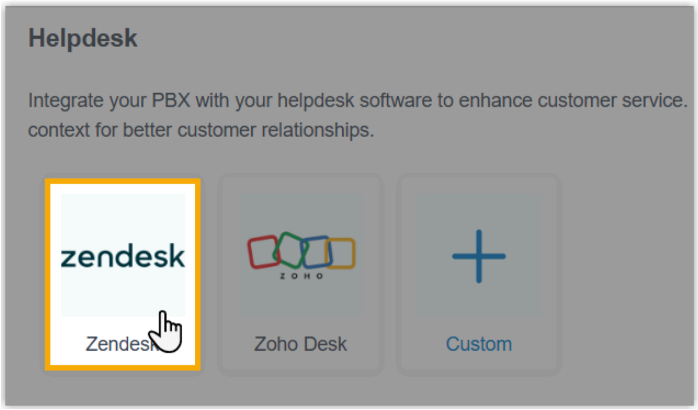
You Zendesk account has administrator privileges in Zendesk support.

Procedure

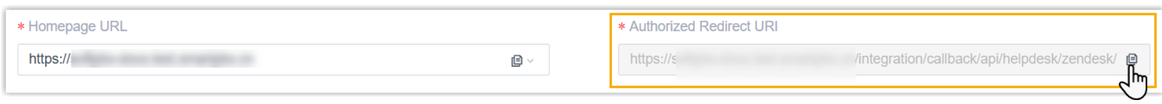
- Step 1. Get authentication information from PBX
- Step 2. Register an application with Zendesk
- Step 3. Make authorization request to Zendesk
- Step 4. Associate Zendesk users with PBX extensions

Step 1. Get authentication information from PBX

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

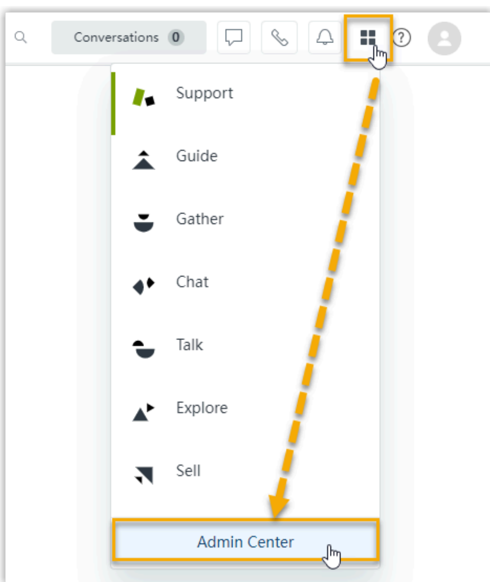


3. In the **Network** section, click to note down the redirect URI, as you will use it when registering an application with Zendesk.

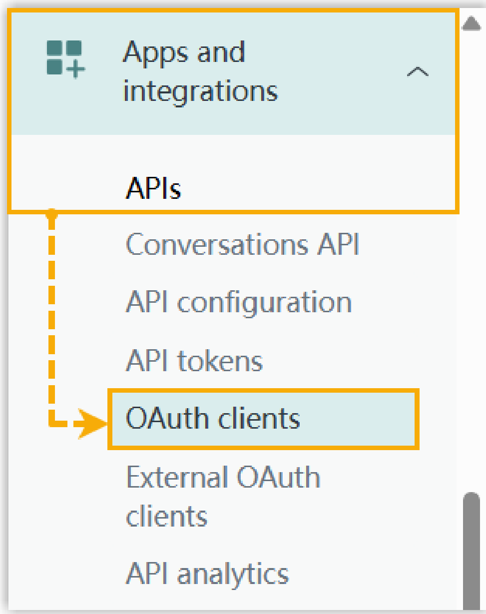


Step 2. Register an application with Zendesk

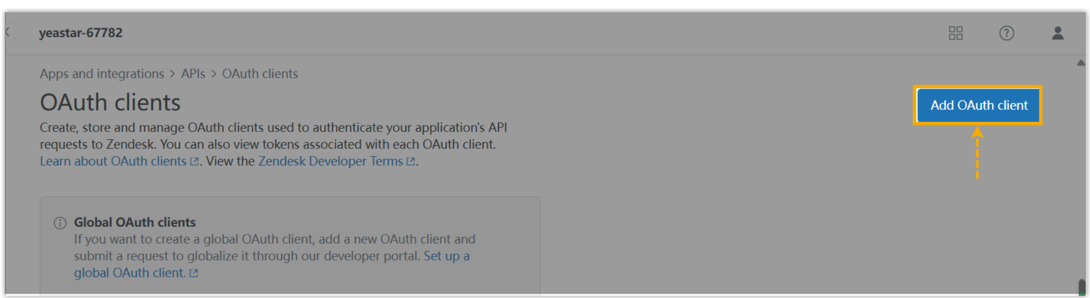
1. Log in to [your Zendesk account].
2. On the top-right corner, click , then click **Admin Center**.



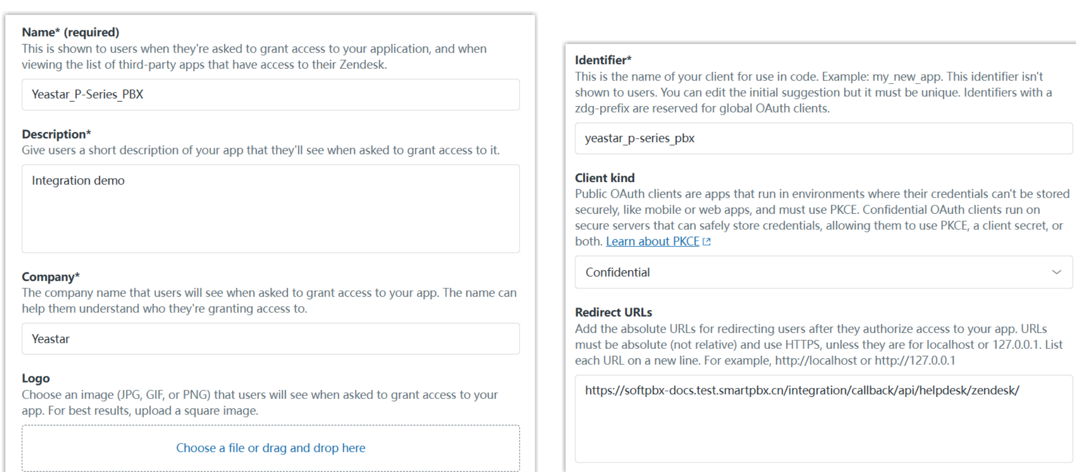
3. On the left navigation bar, go to **Apps and integrations > APIs > OAuth clients**.



4. On the **OAuth clients** page, create an application.
   a. At the top-right corner of the page, click **Add OAuth client**.



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



      - **Name**: Specify a name for the application to help you identify it.

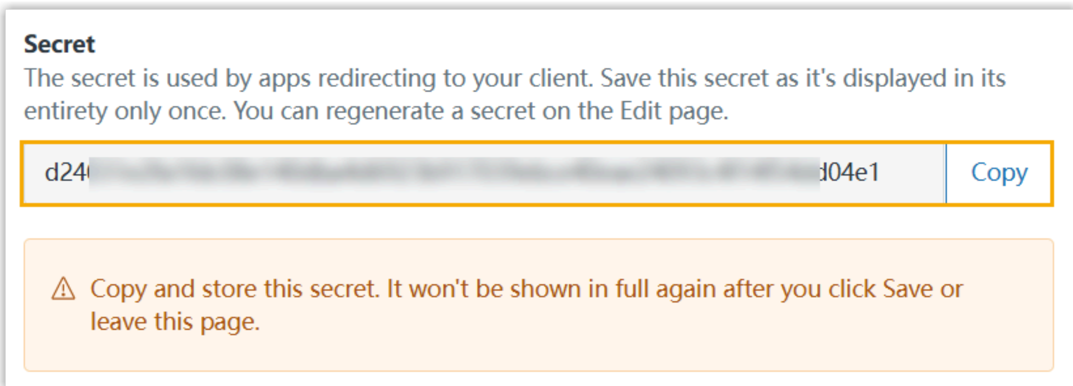
- **Description**: Set a short description for the application.
- **Company**: Set the company name for the application. This field is auto-populated with your organization's name.
- **Logo**: Optional. Set a logo for the application.
- **Identifier**: The field is auto-populated with a reformatted version of the application name.

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

- **Client kind**: Select **Confidential**.
- **Redirect URLs**: Paste the redirect URI obtained from the PBX.

c. Click **Save**.

The **Secret** field at the bottom of the page displays the secret of the application.

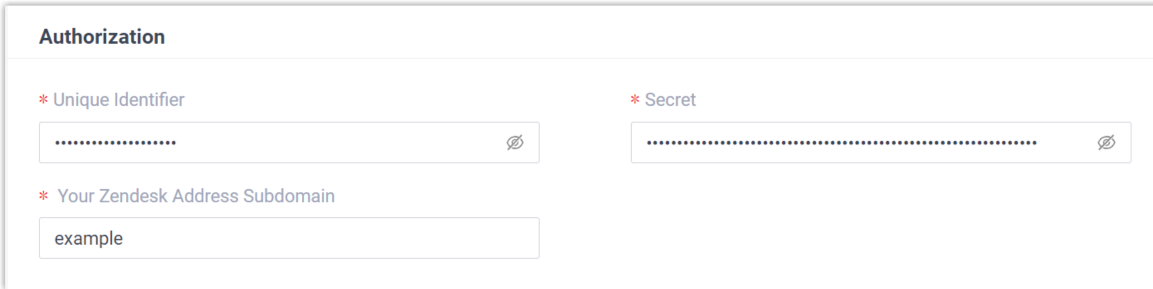


d. Click **Copy** and note down the secret.

> **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`.
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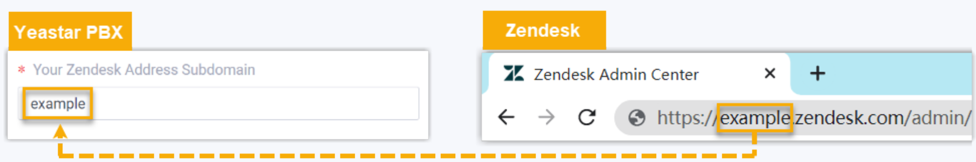
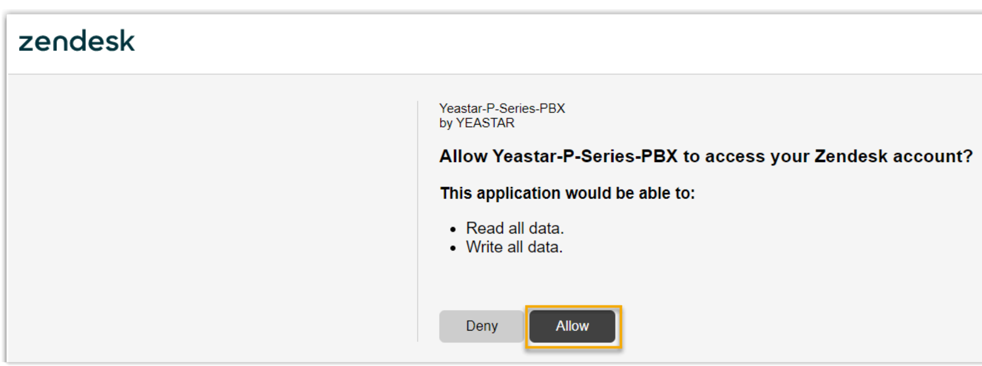
> 
>

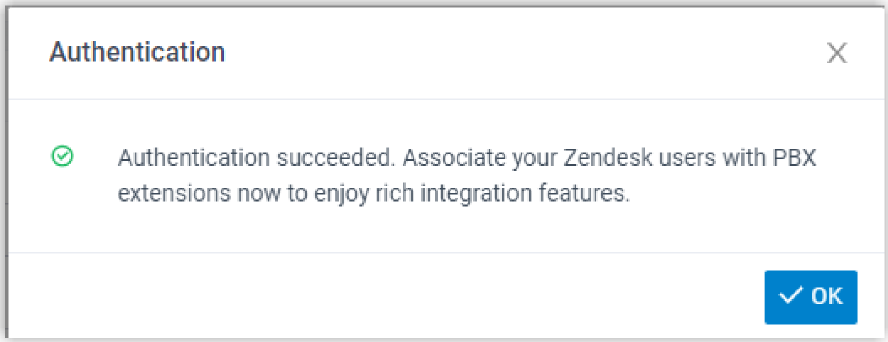
4. Click **Save**.

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



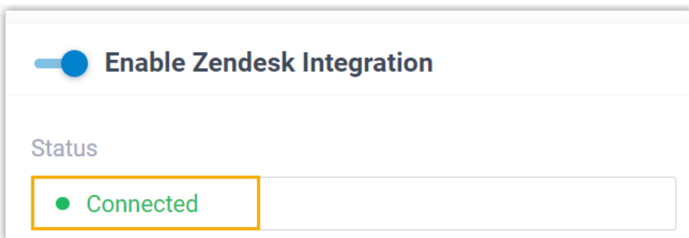
5. Click **Allow** to proceed.

   You are redirected to the PBX configuration page, a pop-up window displays the integration authentication result.



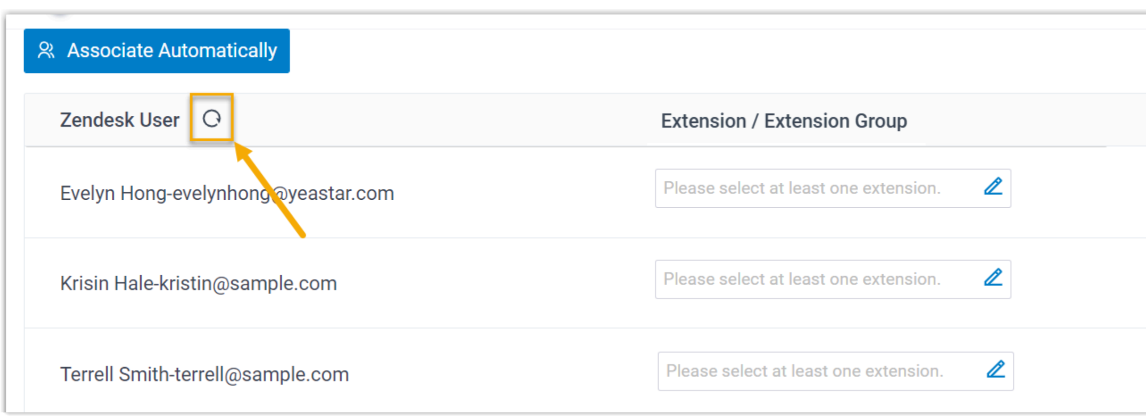
6. Click **OK** to confirm.

   The **Status** field displays **Connected**, indicating that Yeastar P-Series Cloud Edition is connected to Zendesk successfully.



Step 4. Associate Zendesk users with PBX extensions

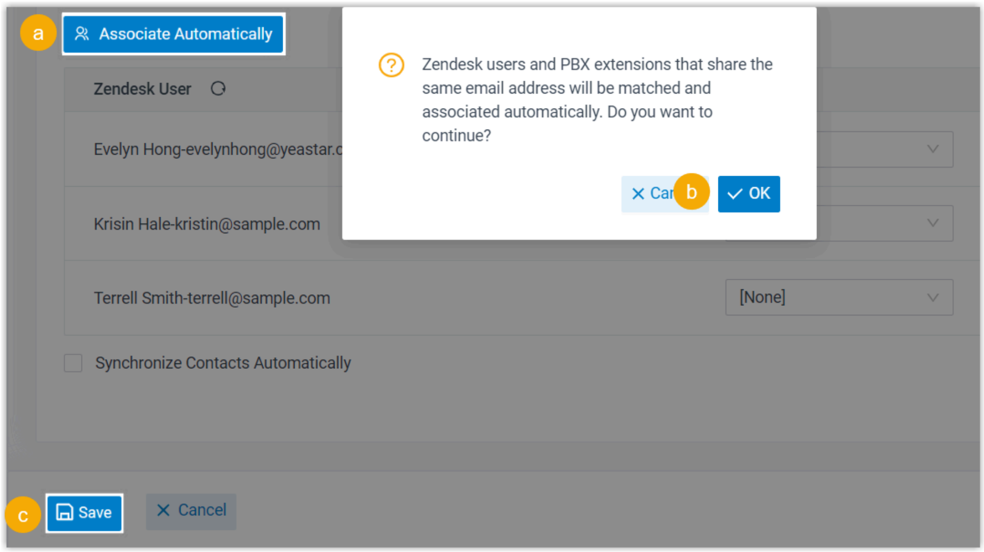
1. On the Zendesk integration page of the PBX, click beside **Zendesk User** to obtain the latest list of Zendesk users.



2. Associate the Zendesk users with PBX extensions.

Associate automatically

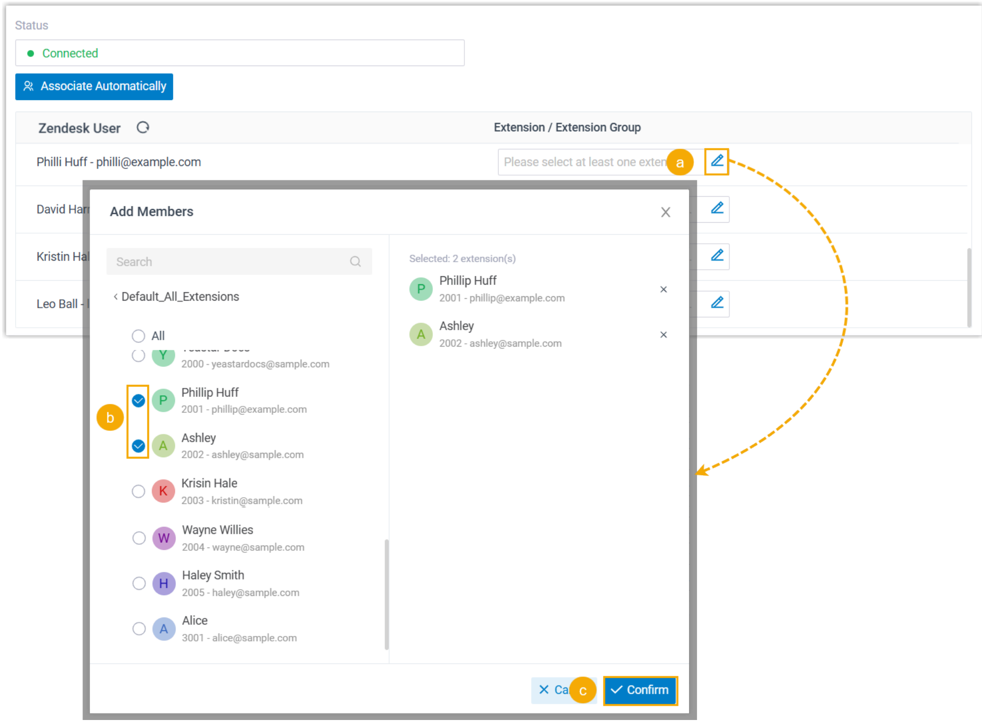
If users bind the same email address to their Zendesk accounts and PBX extensions, you can implement automatic association of their Zendesk accounts and PBX extensions.



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 Yeastar P-Series Cloud Edition and Zendesk is set up.
- Associated Zendesk users can make or receive calls with their PBX extensions.

What to do next

- Set up Contact Synchronization from Zendesk
- Set up Contact Creation for Zendesk
- Set up Automatic Ticket Creation for Zendesk
- Set up Call Popup
- Use Zendesk Integration

Set up Contact Synchronization from Zendesk

After integrating Yeastar P-Series Cloud Edition with Zendesk, you can enable a one-way contact synchronization to synchronize the Zendesk contacts to a specific PBX phonebook.

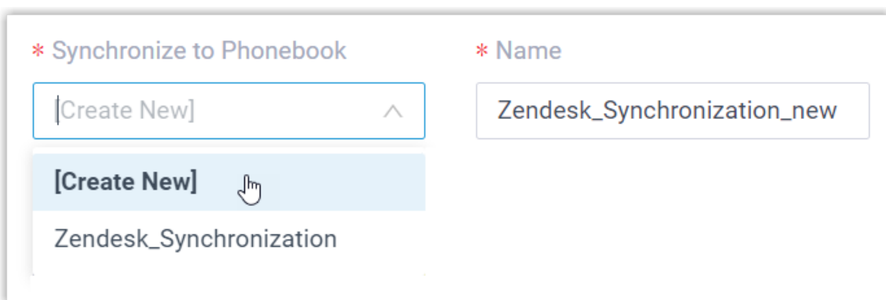
Prerequisites

You have [integrated Yeastar P-Series Cloud Edition with Zendesk](#).

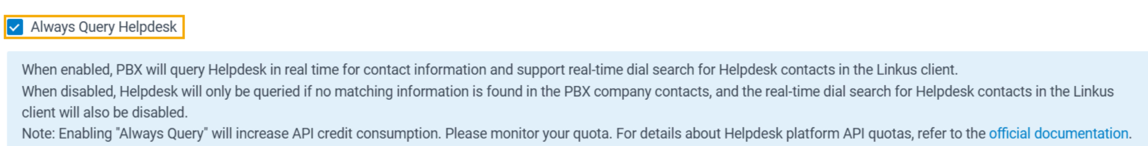
Procedure

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 phonebook 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.

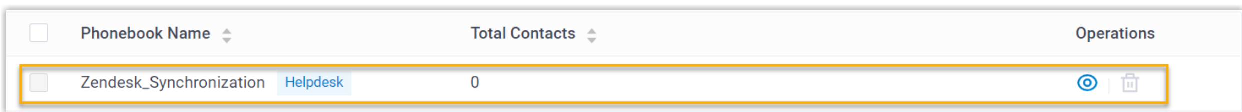
   - If enabled, PBX will query Helpdesk in real time for contact information, and support real-time dial search for Helpdesk contacts in the Linkus clients of the associated extension users.
   - If disabled, PBX will only query Helpdesk when there is no matching information found in the PBX company contacts.

> **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 Yeastar P-Series Cloud Edition automatically.

> **Note:**
> This is a one-way sync from Zendesk to Yeastar P-Series Cloud Edition, 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

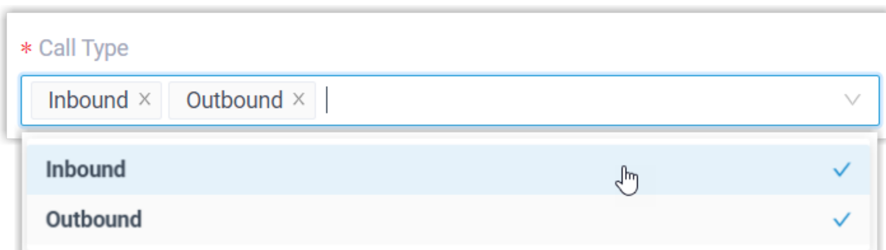
After integrating Yeastar P-Series Cloud Edition with Zendesk, you can enable automatic or manual contact creation. This feature helps Zendesk users build their contacts database, ensuring that all contacts are captured when unknown calls are received or placed in Zendesk.

Prerequisites

You have integrated Yeastar P-Series Cloud Edition 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 automatically created in the Helpdesk.

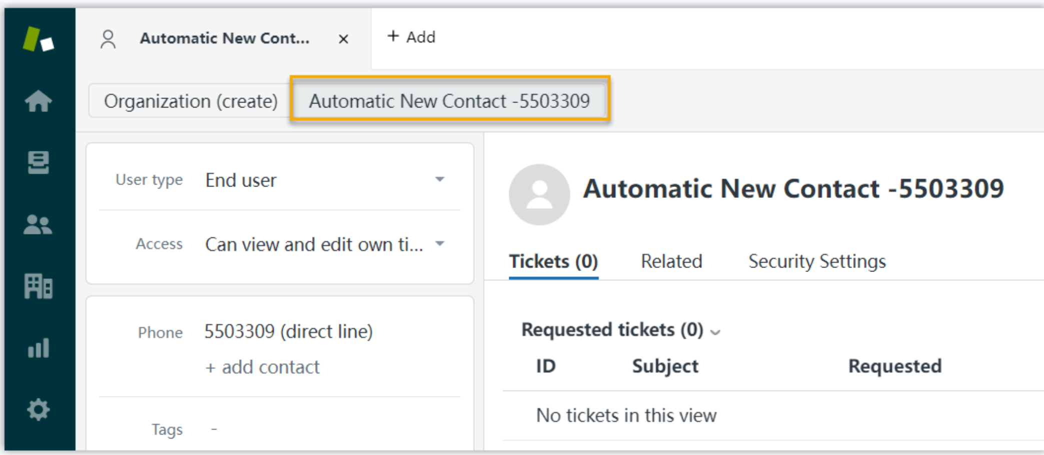
        

            - **Inbound**: Inbound call from an unknown number that doesn't match a Contact, Lead, or Account already in the Helpdesk.
            - **Outbound**: Outbound call to an unknown number that doesn't match a Contact, Lead, or Account already in the Helpdesk.
    - If you want to allow associated extension users to manually create contacts in the Helpdesk during a call, select **Manually**.
4. Click **Save**.

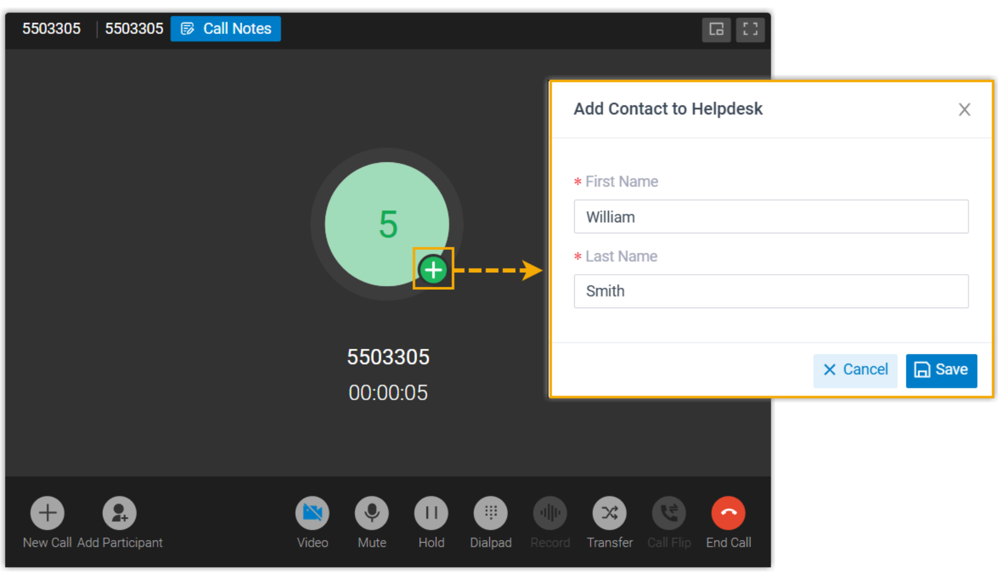
Result

- 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 Yeastar P-Series Cloud Edition.

Set up Automatic Ticket Creation for Zendesk

After integrating Yeastar P-Series Cloud Edition with Zendesk, you can set up automatic ticket creation for Zendesk contacts, so as to automatically convert inbound calls and outbound calls into support tickets.

Prerequisites

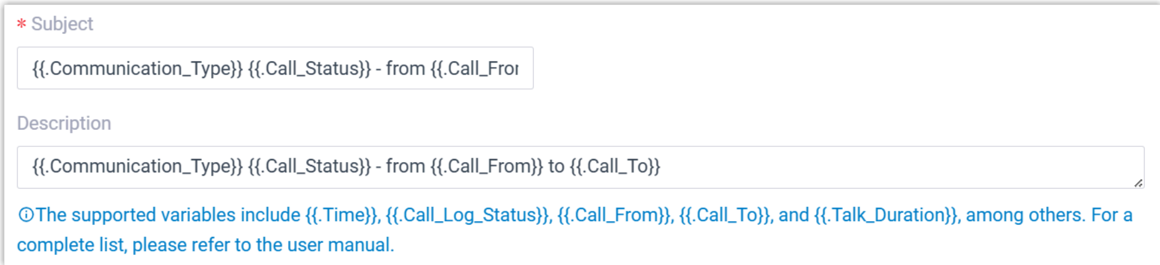
You have integrated Yeastar P-Series Cloud Edition with Zendesk.

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 New Ticket	Description
Before the Call	A ticket will be created in Zendesk when the Zendesk user receives an inbound call from, 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.



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

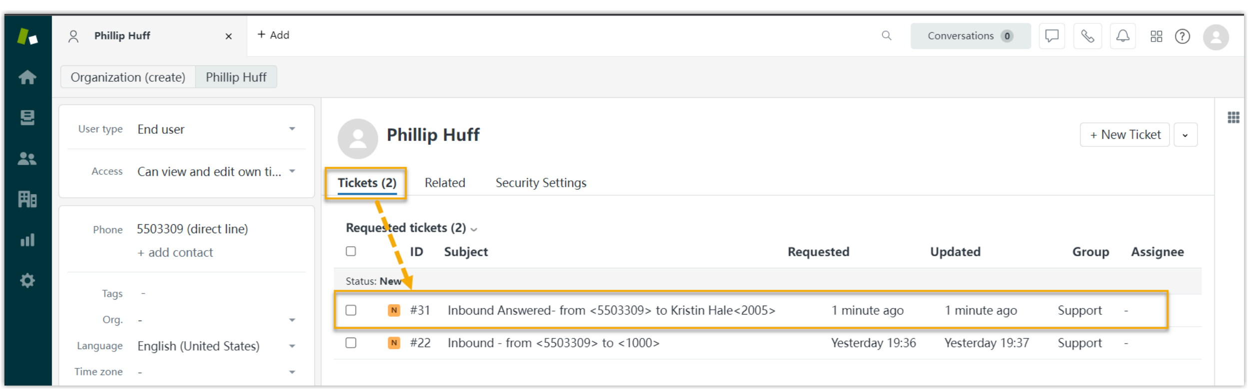
> **Note:**
> The contents can be composed of variables. For the supported variables, see XML Descriptions for Integration Template - New Ticket Creation Scenario Variables.

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.



Related information

Enable Call Recording Playback in Zendesk

Set up Call Popup

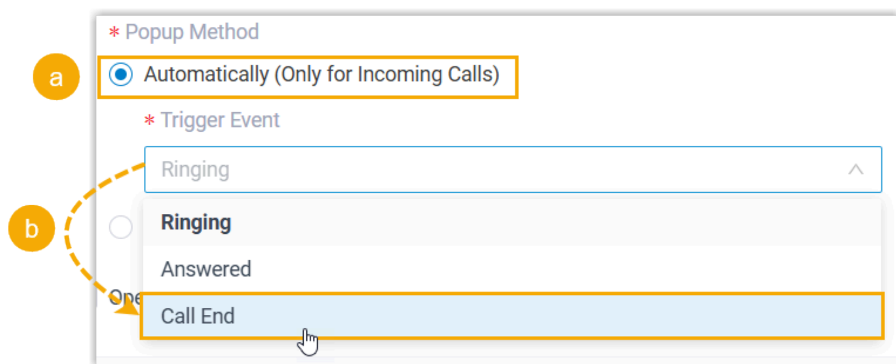
After the integration with Zendesk, a web browser tab displaying the Zendesk contact's information will be automatically launched when a Zendesk user receives an inbound call from a Zendesk contact by default. You can also configure the call popup to be triggered when a call is answered or ended as needed.

Prerequisites

You have [integrated Yeastar P-Series Cloud Edition 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 **Linkus Clients** tab, scroll down to your desired Linkus 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:

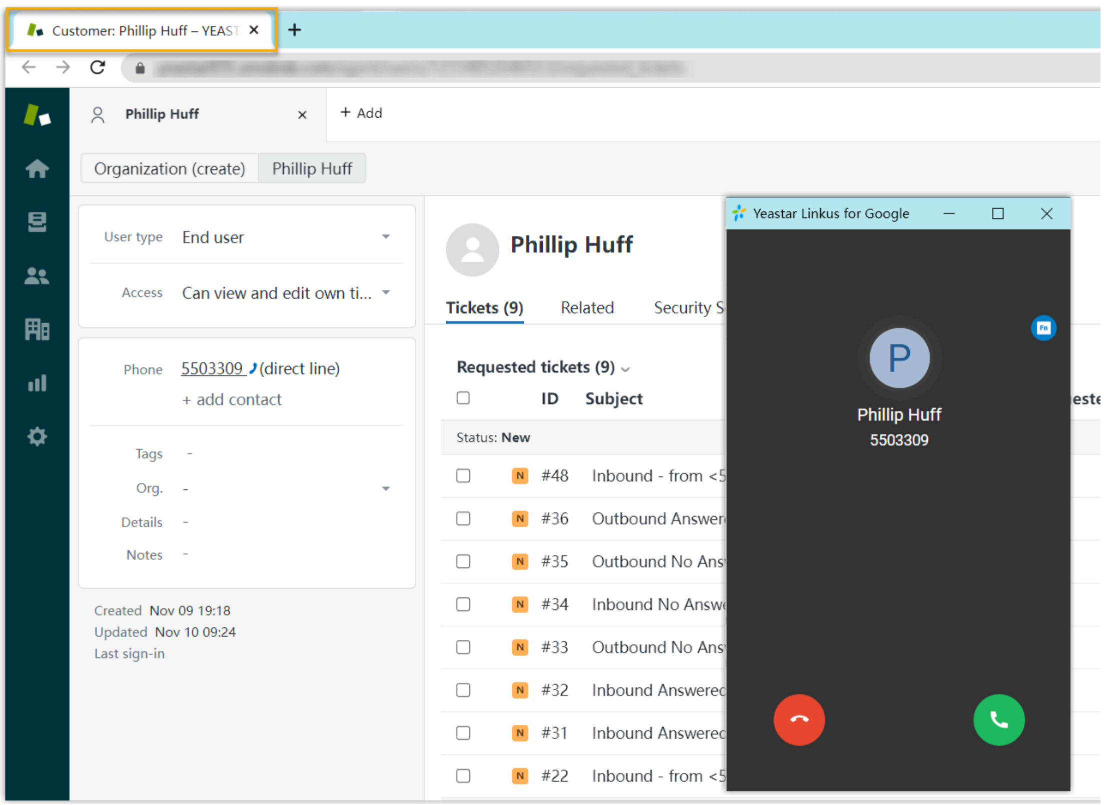


        a. Select **Automatically (Only for Incoming Calls)**.
        b. In the **Trigger Event** drop-down list, set when the call popup will be automatically triggered.
            - **Ringing**: A call popup will be triggered when a user receives an inbound call from a Helpdesk contact.
            - **Answered**: 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.

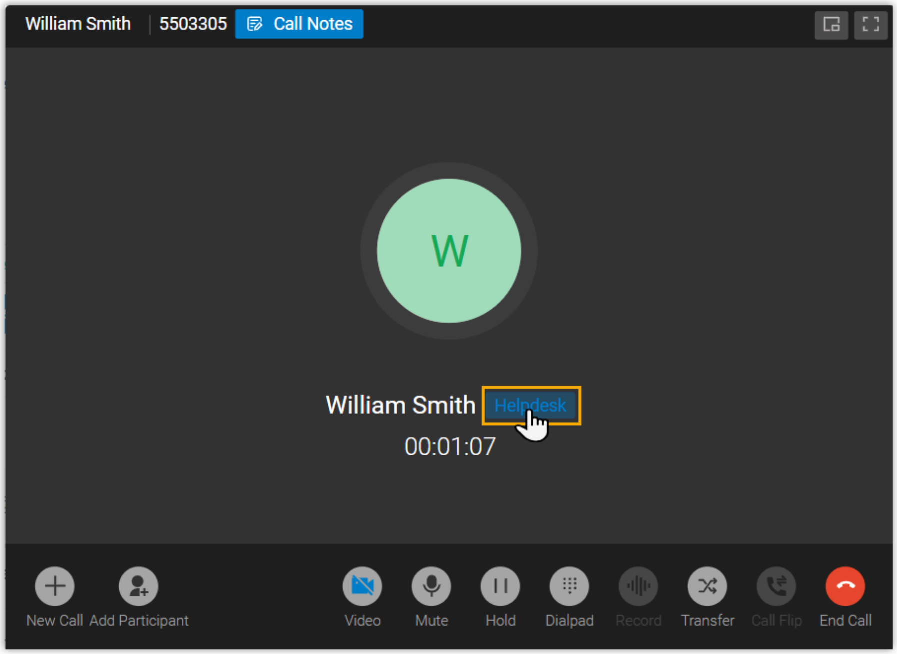
   - If you want the associated extension user to manually open the contact's URL during a call with a CRM contact, select **Manually**.
5. Click **Save**.

Result

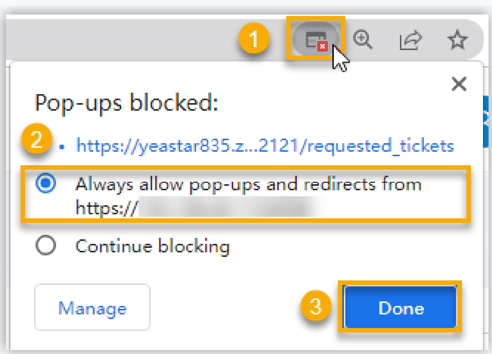
- If automatic call popup is configured, when the specified trigger event occurs on an inbound call from a Zendesk contact, a new browser tab will be launched to show the contact's information from the Zendesk.



- 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 associated 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 Yeastar P-Series Cloud Edition with Zendesk.
- You have Set up Automatic Ticket Creation for Zendesk.

Procedure

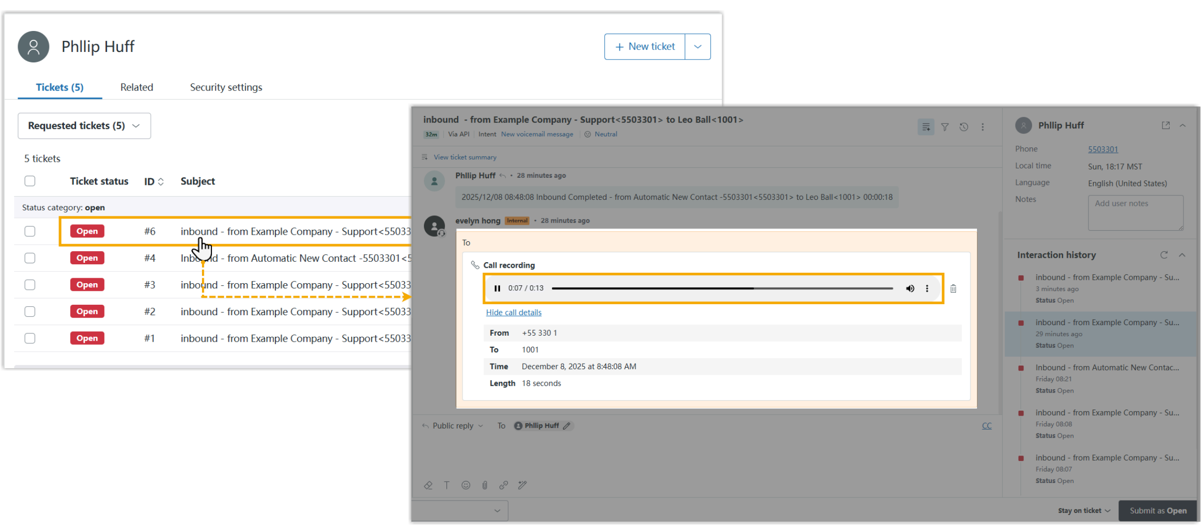
1. Log in to PBX web portal, go to **Integration > Helpdesk**.
2. On the Zendesk integration page, scroll down to **Call Journal**.
3. Select the checkbox of **Play Call Recording**.

   If enabled, the Zendesk users who associated with extensions on PBX can directly view and play call recordings stored on the PBX within the Zendesk system.

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

Result

The Zendesk users who associated with PBX extensions can directly view and play recordings in the corresponding tickets on the Zendesk interface.



Use Zendesk Integration

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

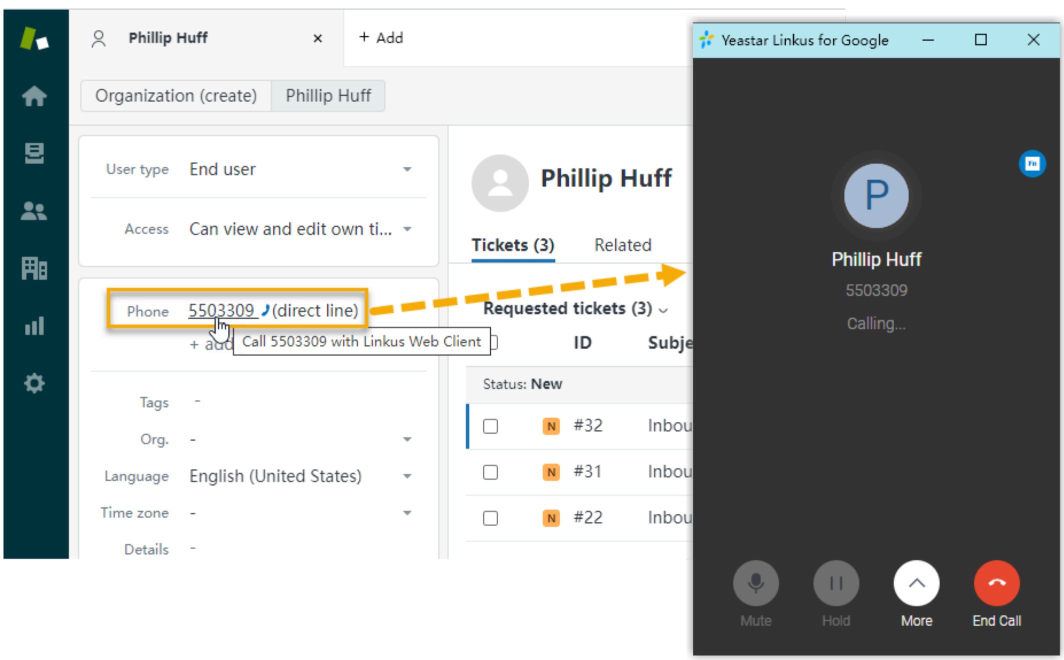
Click to Call

Prerequisites

Install ['Yeastar Linkus for Google'](#) Chrome extension and set up Linkus 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:

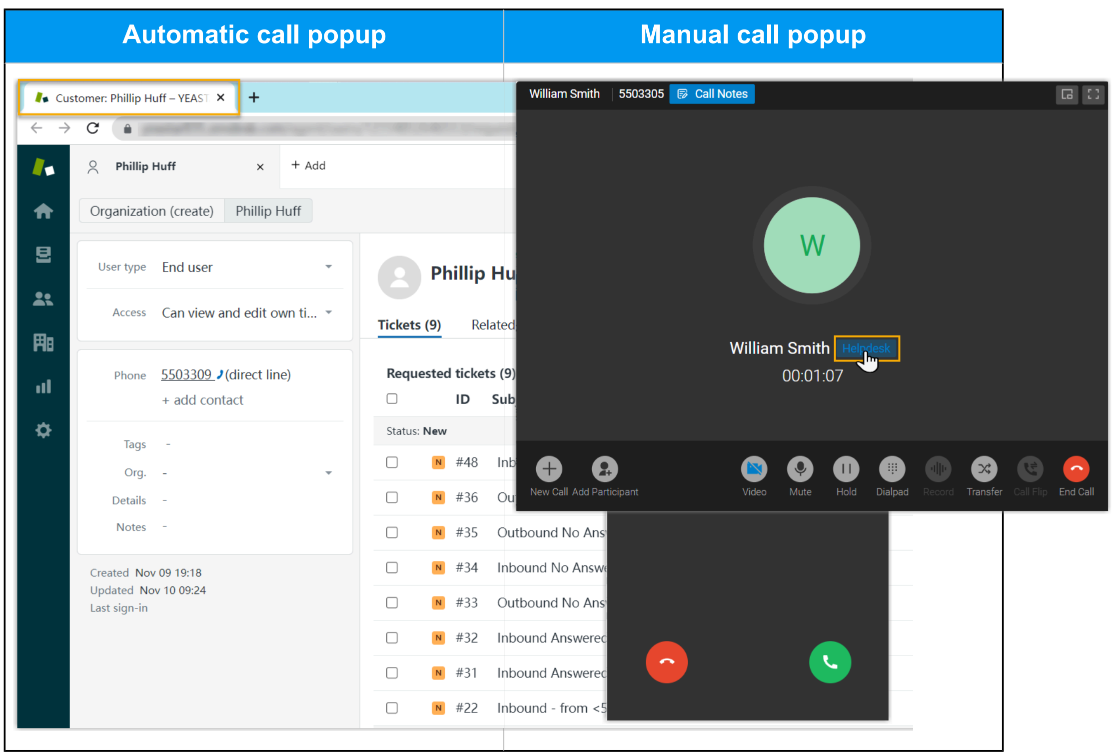
- Linkus Desktop Client
- Linkus Web Client

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

Procedure

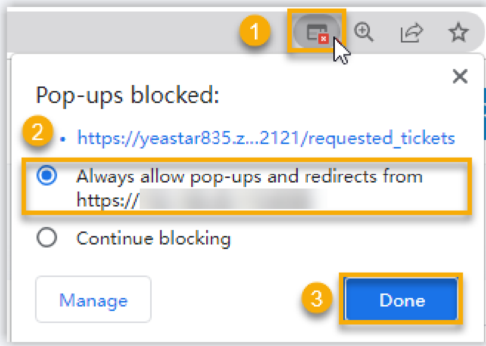
When Zendesk users receive / answer an inbound call from a Zendesk contact, or finish a call with a Zendesk contact, a new browser tab will automatically be launched to show the Zendesk contact's information. Additionally, users can manually open the contact's information from the call window during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

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



Note:

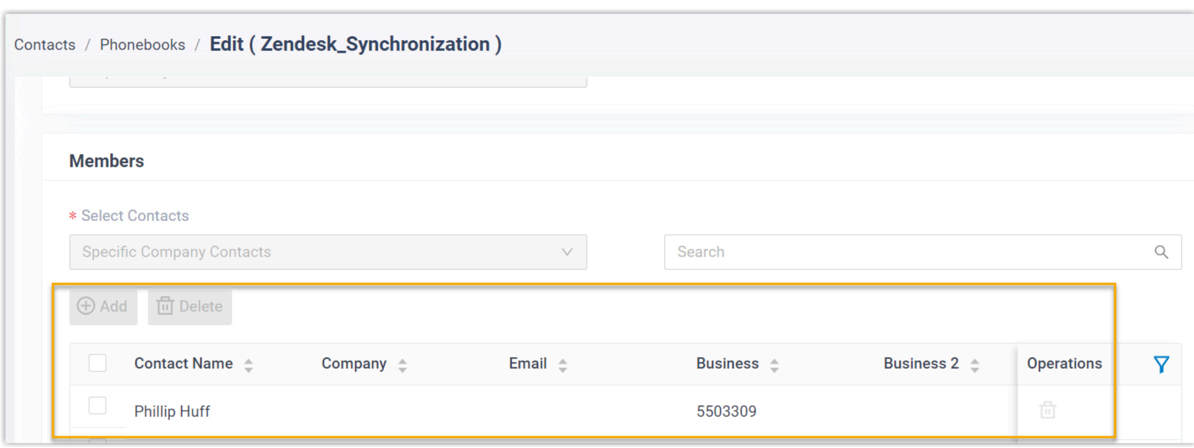
The pop-up window might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click **Done**.



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.

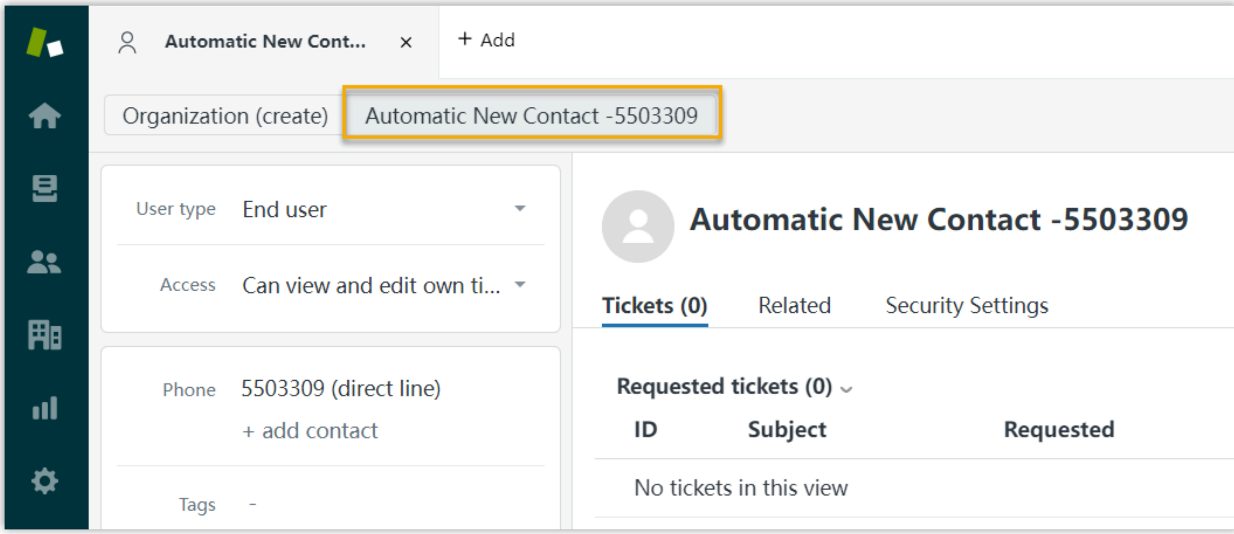
For more information, see Set up Contact Synchronization from Zendesk.



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.

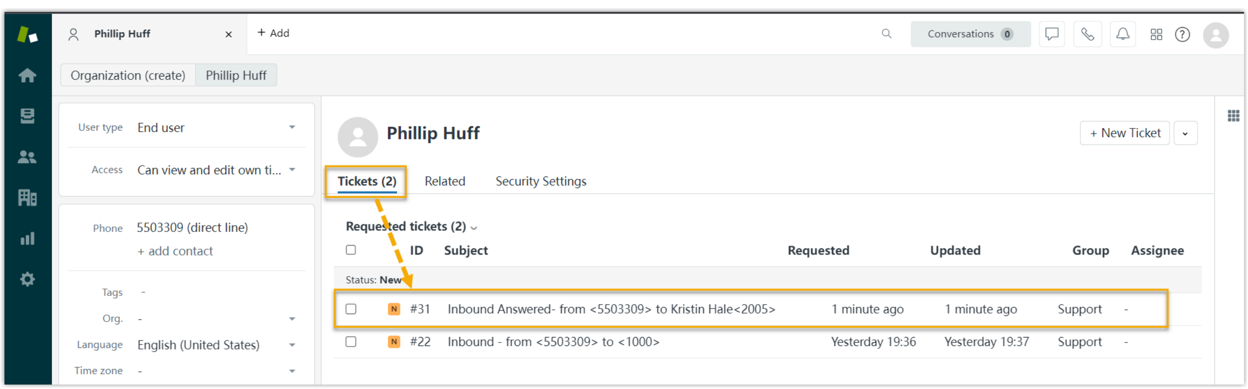
For more information, see Set up Contact Creation for Zendesk.



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.

For more information, see Set up Automatic Ticket Creation for Zendesk.

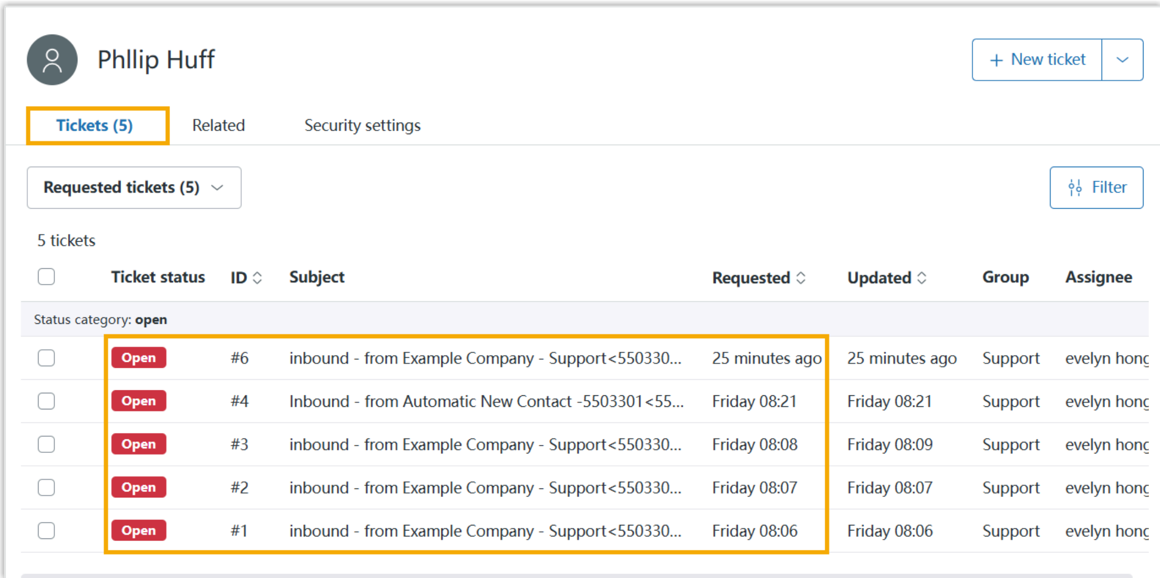


Call Journal

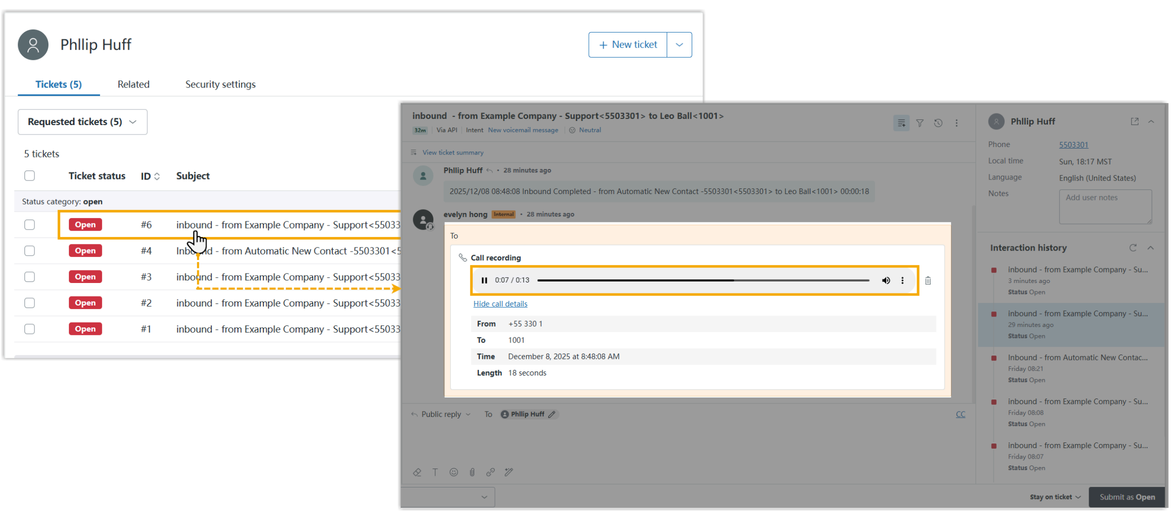
> **Note:**
> The feature is supported only if you have set up automatic ticket creation for Zendesk.

You can view the call log and call recordings in the Zendesk interface.

- 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.



- Additionally, if you have enabled both automatic ticket creation and call recording playback feature, the Zendesk user can view and play the related call recording in the corresponding ticket.

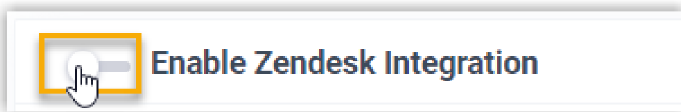


Disable Zendesk Integration

You can disable the Zendesk integration on Yeastar P-Series Cloud 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

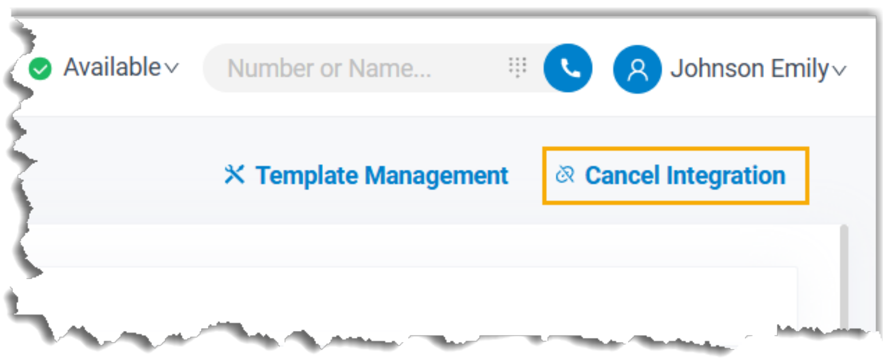
- The **Status** field displays **Disabled**.
- The Zendesk integration configurations are retained, and can be used directly the next time it is enabled.

Disconnect Zendesk Integration

When you want to integrate with another helpdesk service, you need to disconnect the current 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.