

Zendesk Integration Guide

Yeastar P-Series Cloud Edition

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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 an inbound call from a Zendesk 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.

Terminologies

The following table lists the terminologies of the Zendesk integration.

Table 1.

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 Automatic Contact Creation for Zendesk](#)

[Set up Automatic Ticket Creation for Zendesk](#)

[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

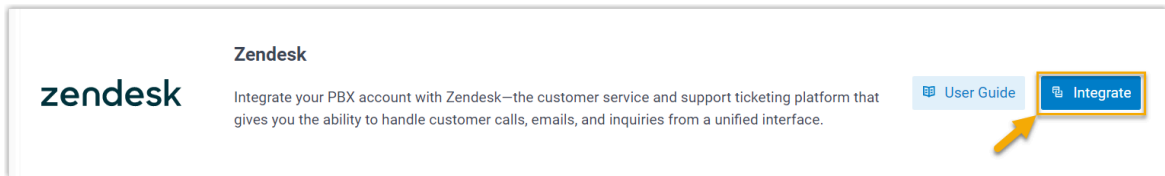
Your Zendesk account has administrator privileges in Zendesk support.


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**.

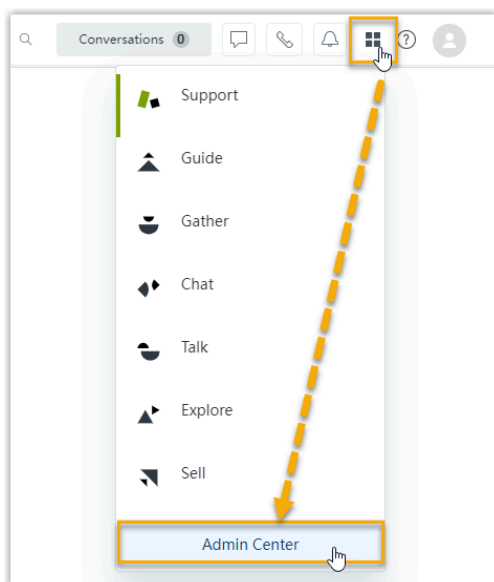


3. In the **Network** section, click  to note down the redirect URL, as you will use it when registering an application with Zendesk.

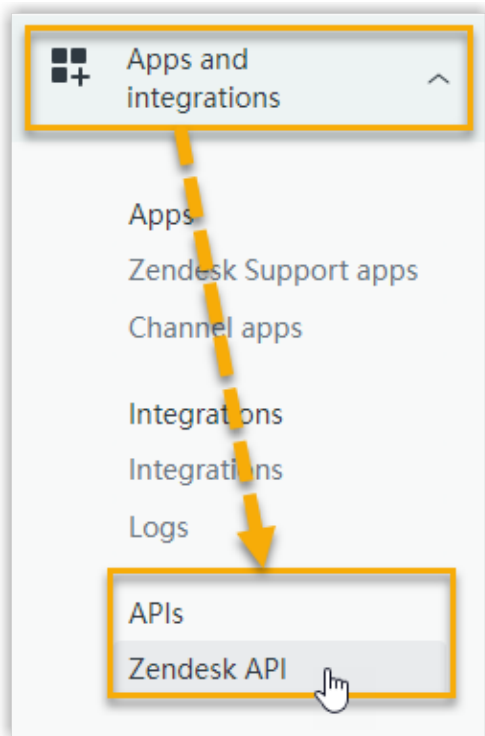
<p>* Homepage URL</p> <input type="text" value="https://docs.example.yeastarcloud.com"/>	<p>* Redirect URL</p> <input type="text" value="https://docs.example.yeastarcloud.com/integration/ca"/> 
--	---

Step 2. Register an application with Zendesk

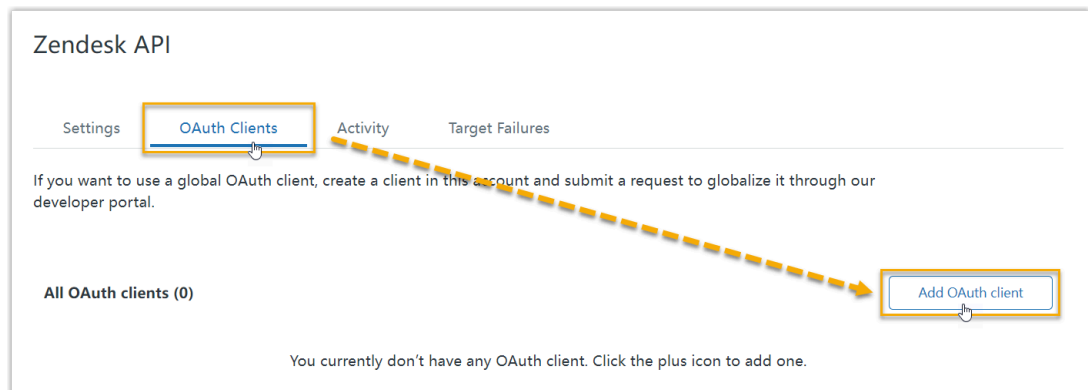
1. Log in to [your Zendesk account](#).
2. On the top-right corner, click , then click **Admin Center**.



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.

Create a new OAuth client

Client name
Your client name shown to users when asked to grant access to your application or when viewing the list of apps that have been granted access.

Yeastar P-Series PBX


Description
A short description of your client for users when they're considering granting access to your application.

The Acme Integration for Zendesk allows your Acme account to connect securely to your Zendesk account to display Zendesk information in your Acme dashboard.

Company
This name is displayed when users are asked to grant access to your application. The name helps users understand to whom they're granting access.

YEASTAR

Logo
Choose an image (JPG or PNG) to display when users are asked to grant access to your application.



Unique identifier
This is the name of your client for use in code. Example: my_awesome_app. This identifier is not shown to Zendesk users. You can change the initial suggestion. Identifiers with a zdg- prefix are reserved for global OAuth clients.

yeastar_p-series_pbx

Redirect URLs
Specify the URL or URLs that Zendesk should use to redirect users after they decide whether or not to authorize your application to access Zendesk. The URLs must be absolute and not relative, https (unless localhost or 127.0.0.1), and newline-separated.

<https://docs.example.yeastarcloud.com/integration/callback/api/helpdesk/zendesk/>

- **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.

- **Redirect URLs:** Paste the [redirect URL obtained from the PBX](#).

c. Click **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

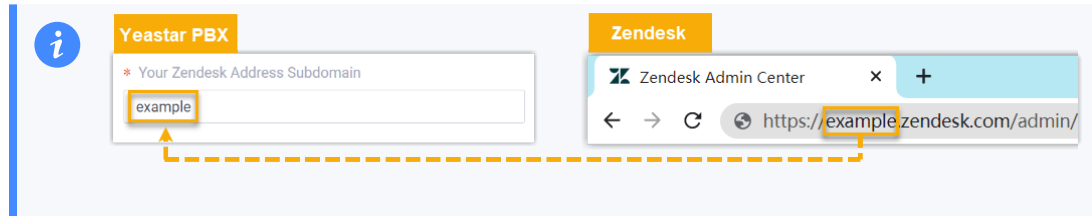
1. Log in to PBX web portal, go to **Integrations > Helpdesk**.
2. On the right side of **Zendesk**, click **Integrate**.
3. In the **Authorization** section, fill in the following information.

- **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.



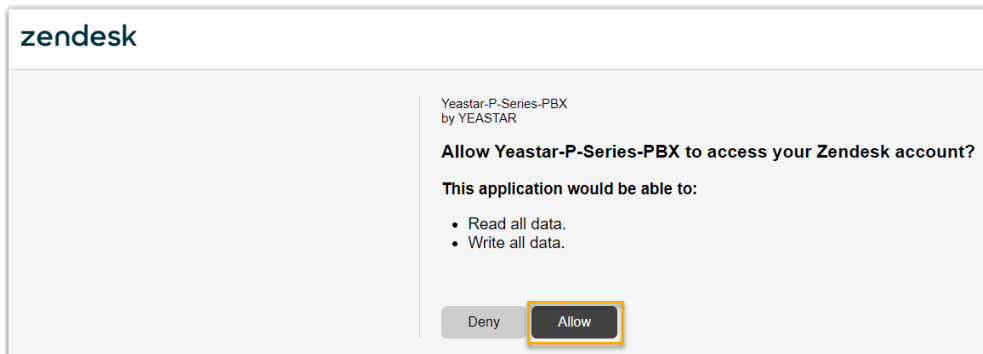
Tip:

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



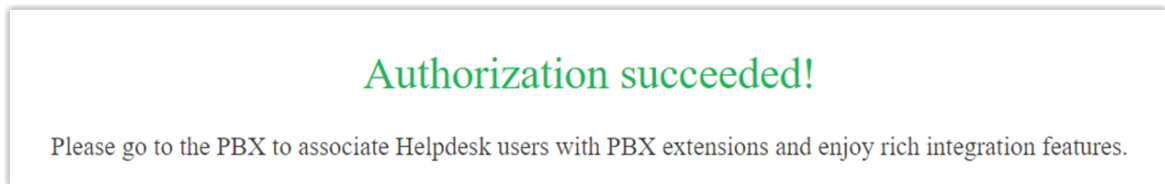
4. Click **Save**.

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

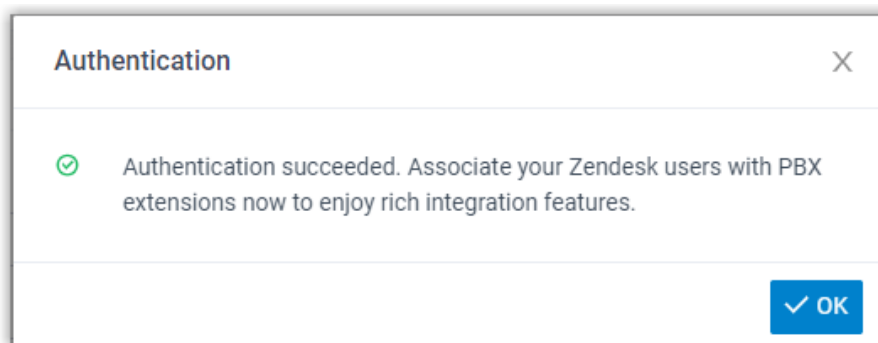


5. Click **Allow** to proceed.

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

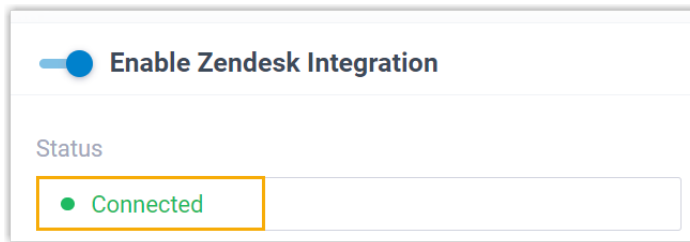


On the PBX configuration page, a pop-up window displays the integration authentication result.




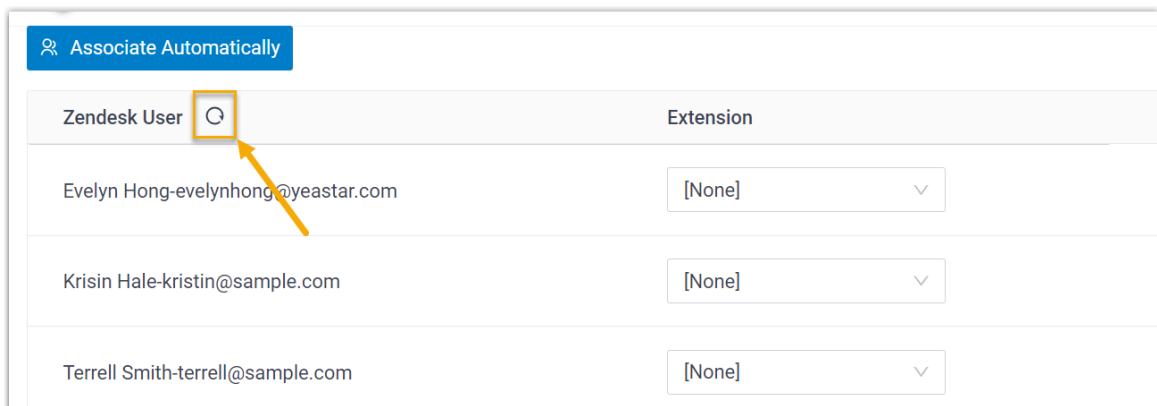
6. Click **OK** to confirm.

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

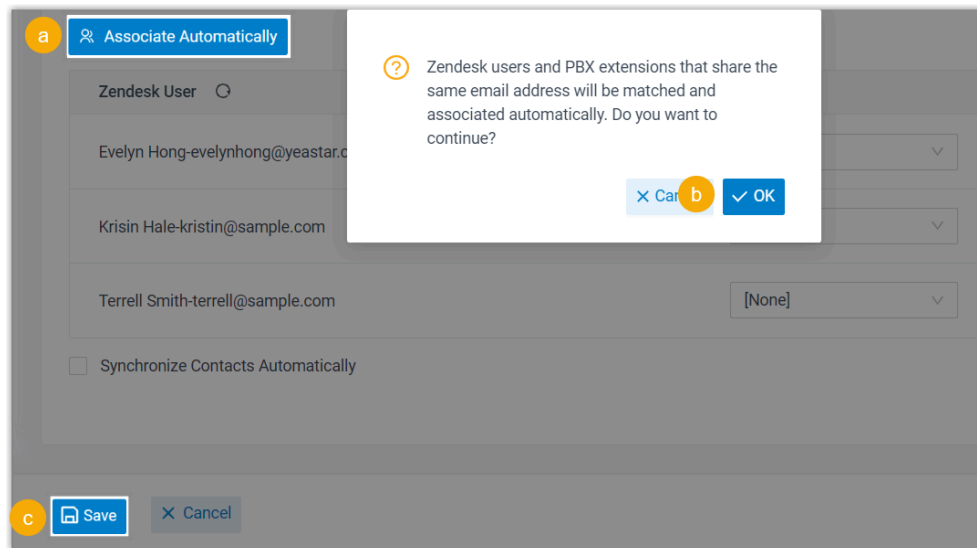
1. On the Zendesk integration page of the PBX, click  beside **Zendesk User** to obtain the latest list of Zendesk users.



2. Associate the Zendesk users with PBX extensions.

Associate automatically

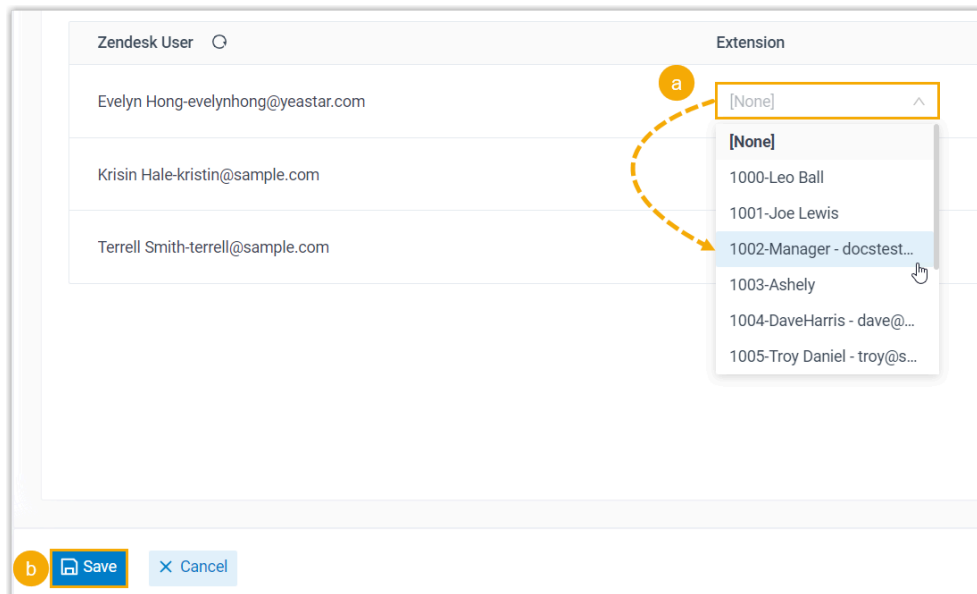
If users bind the same email address to their Zendesk accounts and PBX extensions, you can implement automatic association of their Zendesk accounts and PBX extensions.



- 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** drop-down list beside a desired Zendesk user, select the user's PBX extension.

b. 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 Automatic Contact Creation for Zendesk](#)
- [Set up Automatic Ticket Creation for Zendesk](#)
- [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, select the checkbox of **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.

* Synchronize to Phonebook

* Name

[Create New] ^

Zendesk_Synchronization_new

[Create New]

Zendesk_Synchronization

4. Click **Save**.

Result

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

<input type="checkbox"/>	Phonebook Name	Total Contacts	Operations
<input type="checkbox"/>	Zendesk_Synchronization Helpdesk	0	

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 Automatic Contact Creation for Zendesk

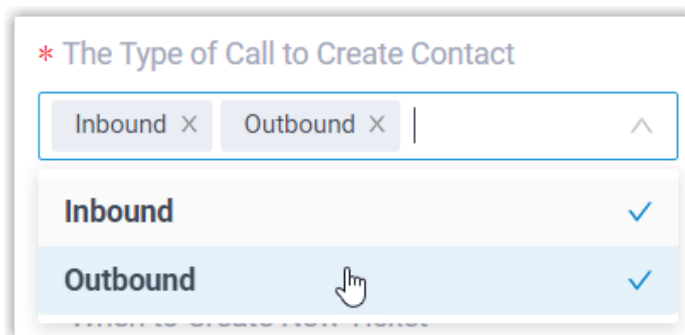
After integrating Yeastar P-Series Cloud Edition with Zendesk, you can enable automatic contact creation. This feature helps Zendesk users build their contacts database, ensuring that all contacts are captured when unknown calls are received or placed in Zendesk.

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, select the checkbox of **Create New Contact Automatically**.
3. In the **The Type of Call to Create Contact** drop-down list, select specific call type(s).



- **Inbound:** Inbound call from an unknown number that doesn't match a "Customer" already in the Zendesk.
 - **Outbound:** Outbound call to an unknown number that doesn't match a "Customer" already in the Zendesk.
4. Click **Save**.

Result

- 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.

Organization (create) Automatic New Contact -5503309

User type End user

Access Can view and edit own ti...

Phone 5503309 (direct line)
+ add contact

Tags -

Automatic New Contact -5503309

Tickets (0) Related Security Settings

Requested tickets (0) ✓

ID	Subject	Requested
No tickets in this view		

- 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.

Add		Delete				
<input type="checkbox"/>	Contact Name	Company	Email	Business	Mobile	Operations
<input type="checkbox"/>	Automatic New Contact...			5503309		

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, select the checkbox of **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	<p>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.</p> <p>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.</p> <ul style="list-style-type: none"> • Inbound: Inbound calls. • Outbound: Outbound calls.
After the Call	<p>A ticket will be created in Zendesk when the user ends the call with a Zendesk contact.</p> <p>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.</p> <ul style="list-style-type: none"> • 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. 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.

Phillip Huff

+ Add

Conversations 0

Organization (create)

Phillip Huff

User type

End user

Access

Can view and edit own ti...

Phone

5503309 (direct line)

+ add contact

Tags

-

Org.

-

Language

English (United States)

Time zone

-

Phillip Huff

+ New Ticket

Tickets (2)

Related

Security Settings

Requested tickets (2)

Status: New

	ID	Subject	Requested	Updated	Group	Assignee
<input type="checkbox"/>	#31	Inbound Answered- from <5503309> to Kristin Hale<2005>	1 minute ago	1 minute ago	Support	-
<input type="checkbox"/>	#22	Inbound - from <5503309> to <1000>	Yesterday 19:36	Yesterday 19:37	Support	-

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.

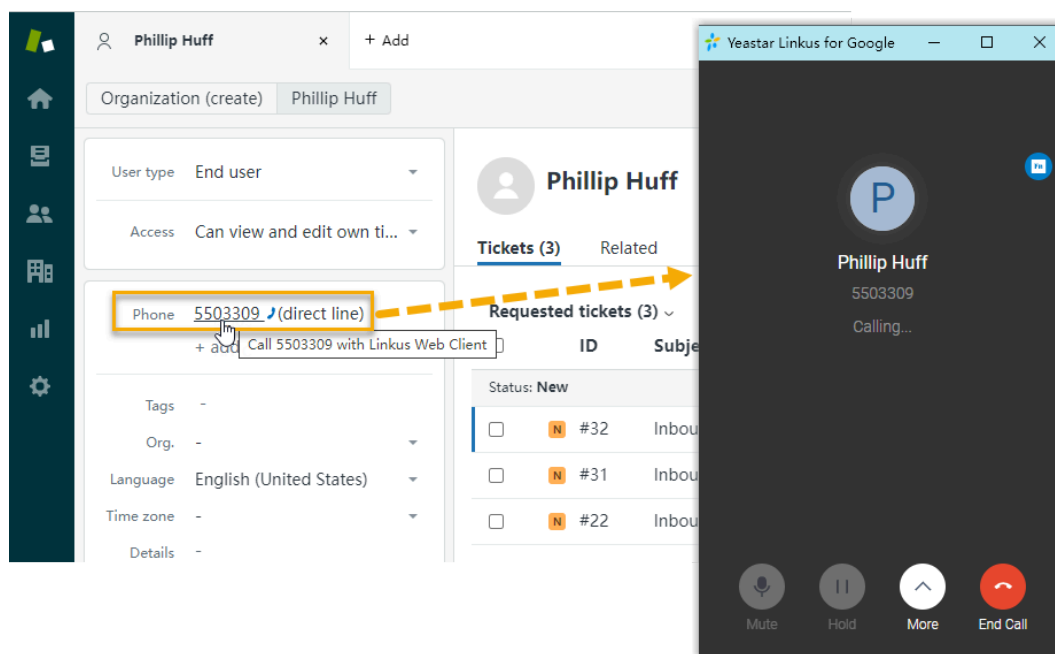
Click to Call

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:

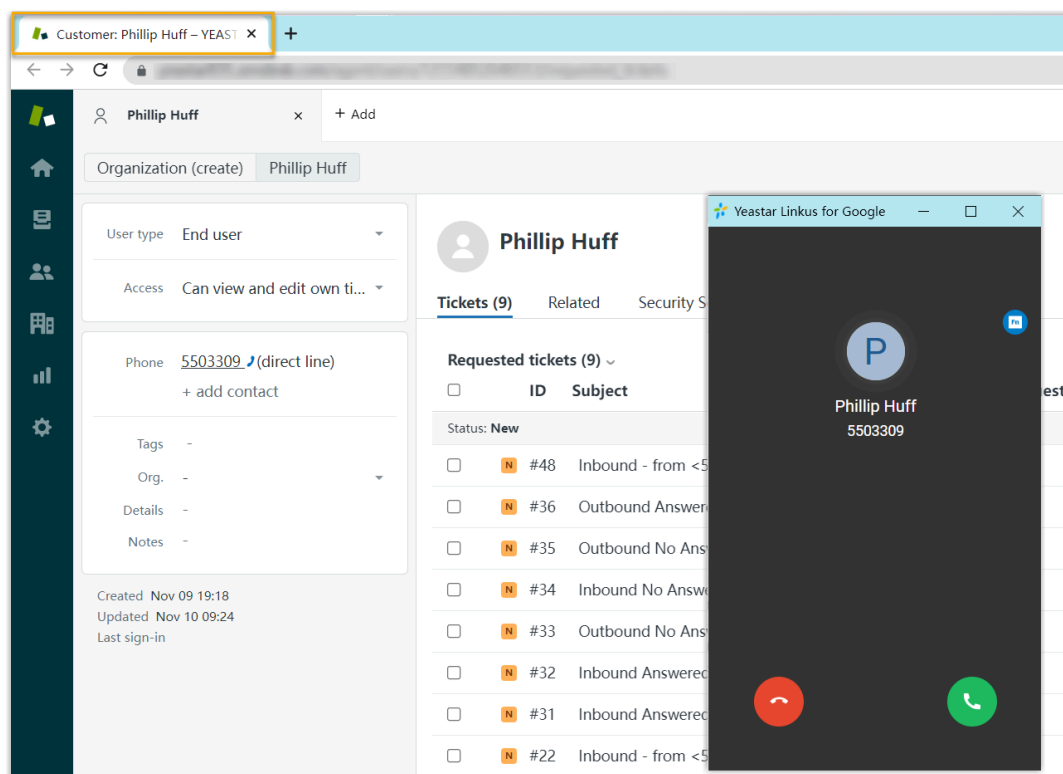
- Linkus Desktop Client
- Linkus Web Client

**Note:**

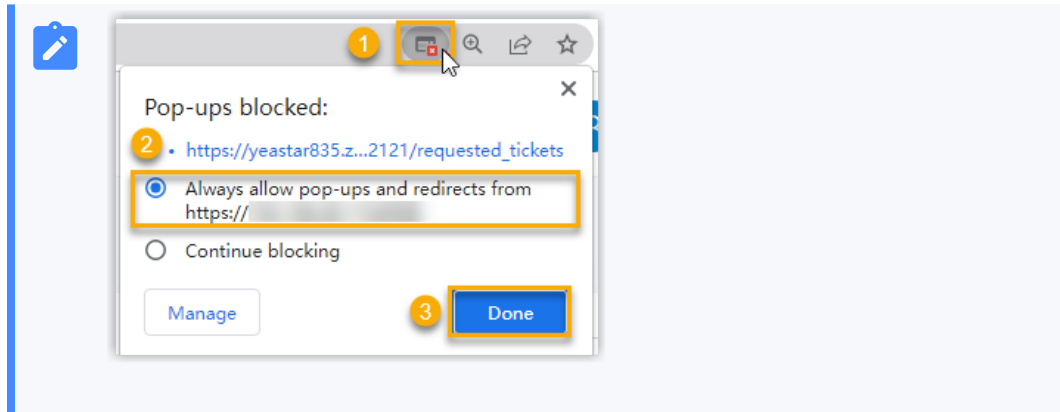
If users close web browser or Linkus Web Client tab, they can NOT receive calls. To avoid this, users can install Chrome extension '[Yeastar Linkus for Google](#)', which allows for the call pop-up browser tab even when web browser is closed.

Procedure

When the extension associated with a Zendesk user receives an inbound call from a Zendesk contact, a new browser tab will be launched to show the Zendesk contact's information.

**Note:**

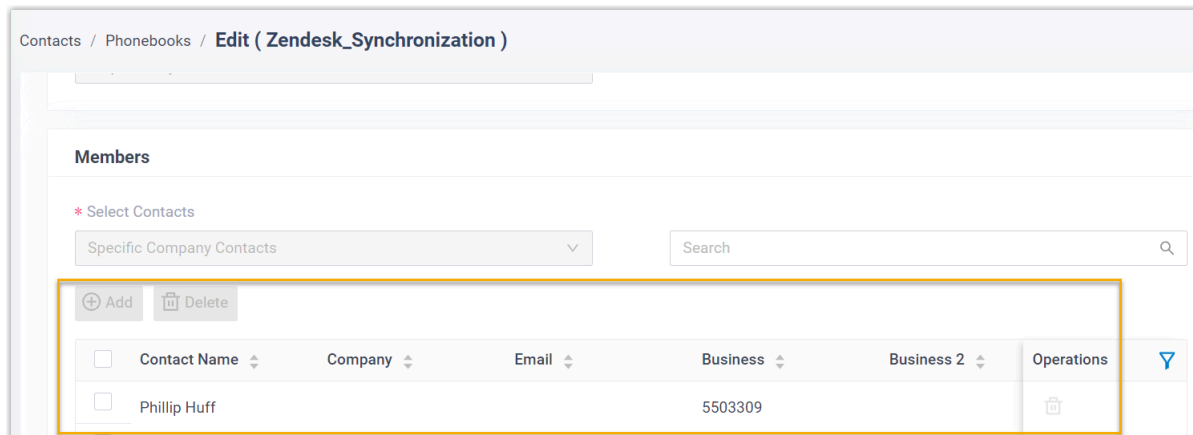
The pop-up window might be blocked by the browser. In this case, users need to click on the blocked icon at the search bar, allow the pop-up window and website redirection, and then click **Done**.



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.

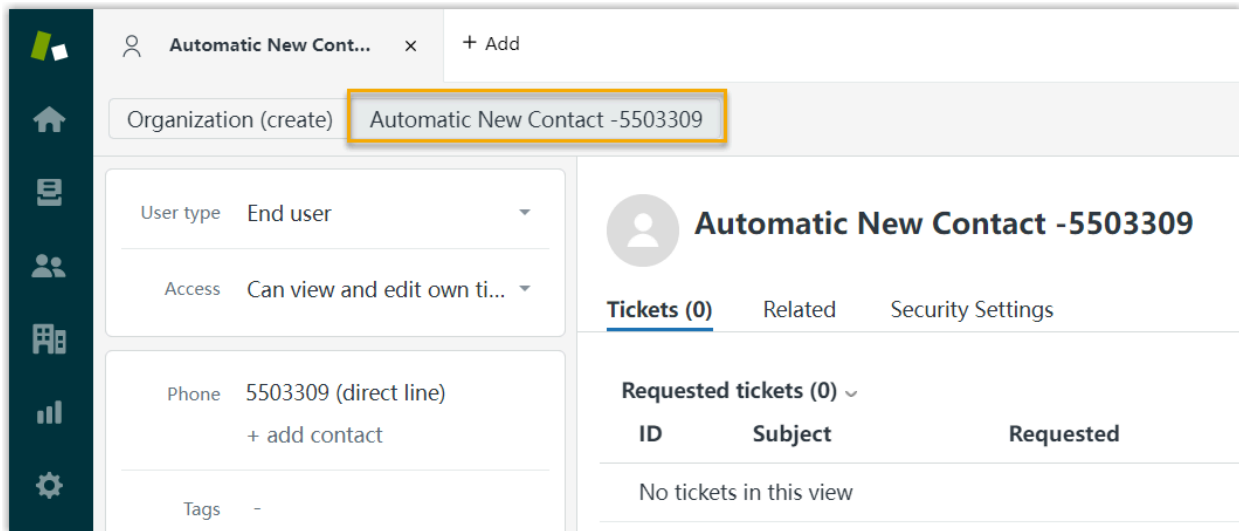
For more information, see [Set up Contact Synchronization from Zendesk](#).



Automatic Contact Creation

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

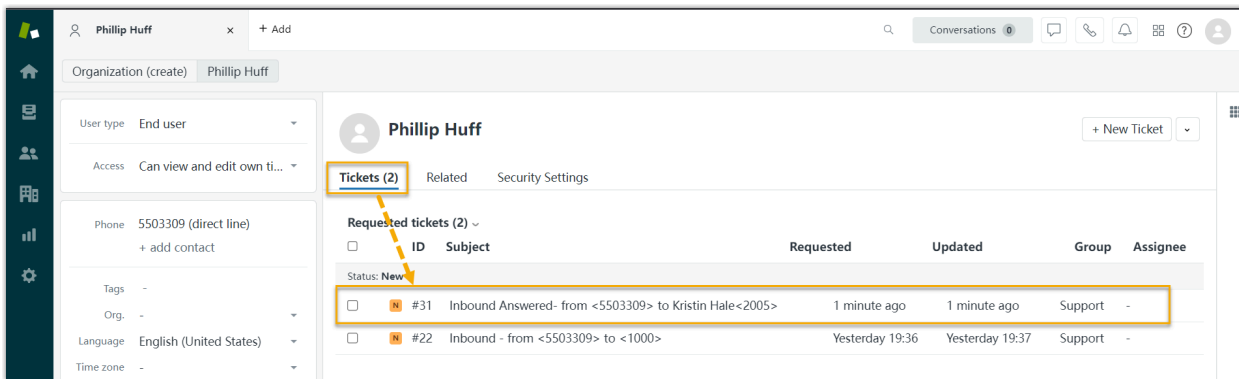
For more information, see [Set up Automatic Contact Creation for Zendesk](#).



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](#).

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.








 **Phillip Huff**

Tickets (8)

Related

Security Settings

+ New Ticket

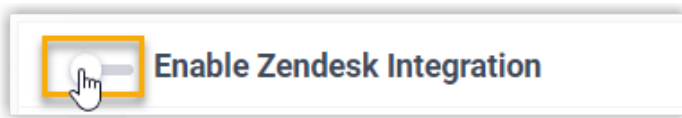
Requested tickets (8) ▾						
<input type="checkbox"/>	ID	Subject	Requested	Updated	Group	Assignee
Status: New						
<input type="checkbox"/>	 #36	Outbound Answered- from Kristin Hale<2005> to <5503309>	37 minutes ago	37 minutes ago	Support	-
<input type="checkbox"/>	 #35	Outbound No Answer- from Kristin Hale<2005> to <5503309>	43 minutes ago	43 minutes ago	Support	-
<input type="checkbox"/>	 #34	Inbound No Answer- from <5503309> to Kristin Hale<2005>	43 minutes ago	43 minutes ago	Support	-
<input type="checkbox"/>	 #33	Outbound No Answer- from Kristin Hale<2005> to <5503309>	43 minutes ago	43 minutes ago	Support	-
<input type="checkbox"/>	 #32	Inbound Answered- from <5503309> to Kristin Hale<2005>	Today 09:28	Today 09:28	Support	-
<input type="checkbox"/>	 #31	Inbound Answered- from <5503309> to Kristin Hale<2005>	Today 09:28	Today 09:28	Support	-
<input type="checkbox"/>	 #22	Inbound - from <5503309> to <1000>	Yesterday 19:36	Yesterday 19:37	Support	-

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

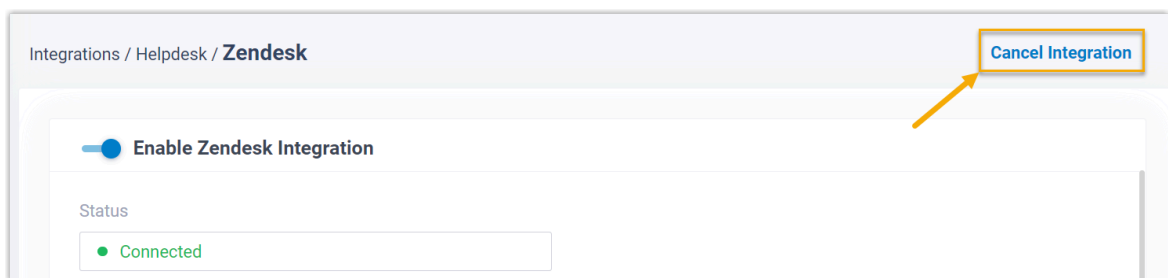
- The **Status** field displays **Disabled**.
- The Zendesk integration configurations are retained, and can be used directly the next time it is enabled.

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. On the top-right corner of the Zendesk integration page, 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.