



CXone Agent for Zendesk Integration Guide

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Introduction

Audience

This document is directed to customers and prospective customers interested in using CXone in a Zendesk environment. Those who will perform the procedures described in this guide should have a basic level of familiarity with Zendesk APIs, Zendesk administration, general networking, and NICE inContact CXone.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to understand a proposed Zendesk/NICE inContact integration. This document is NOT intended as a specific system or network design document. If further clarification is needed, consult with a NICE inContact representative.

Terminology

To ensure a common frame of reference, this guide uses the following terms in conjunction with this Zendesk integration:

- **Application Programming Interface (API):** A set of clearly defined methods of communication used by NICE inContact CXone for reading and writing data.
- **Click to Dial:** A feature in the CXone Agent which allows agents to click a properly formatted phone number directly on a web page to dial a contact.
- **NICE InContact Cloud:** A set of Web Services that receives events from the telephony system and takes further action such as querying and saving to the CRM.
- **CXone Embedded Agent (CEA):** An agent facing user interface which agents will interact with for identifying callers, viewing recent activities, saving notes, dispositioning calls, etc.

Customer Responsibilities

You are responsible for supplying the IP connection(s) to Zendesk and for obtaining any licensing required by Zendesk. You are also responsible for configuring Zendesk to support the NICE inContact CXone integration.

Integration Overview

Zendesk Requirements

Version Requirements

Zendesk Talk Partner Edition Licenses to cover the Zendesk CXone Embedded Agent Named Users.

Connection Requirements

Accessible via TCP port 443 (https) to NICE inContact CXone Cloud Dedicated Service Account (i.e. API User).

Installation

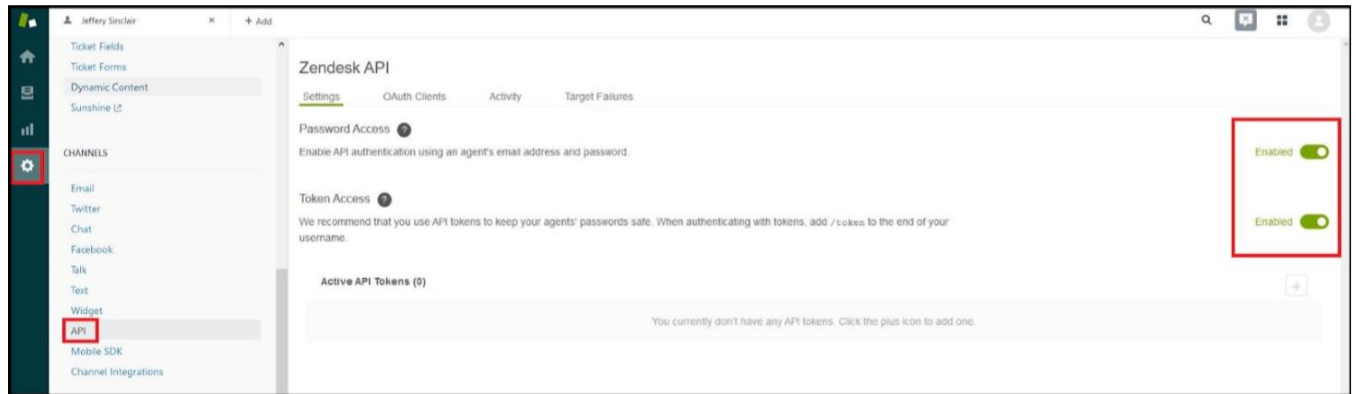
Installation Requirements

Your Zendesk system must meet the following requirements to integrate with the agent application:

- Your system must have sufficient Zendesk Talk Partner Edition licenses - 1 license for each user with access to the integrated agent.
- A dedicated administrator service account (API user), which you can identify on the [Company Settings page](#) in the CXone Console, explained in the following section.
- API password and token access enabled in the Zendesk platform.
- Accessibility via TCP port 443 (https) to the NICE inContact CXone Cloud.

Enable Zendesk API Password and Token Access

1. Log into Zendesk.
2. Click the cog wheel in the left sidebar to open the settings list.
3. Select **API** in the list (under the **Channels** section).
4. Enable [Password Access](#) and [Token Access](#) on the Settings tab.



Connecting Zendesk to your CXone Environment

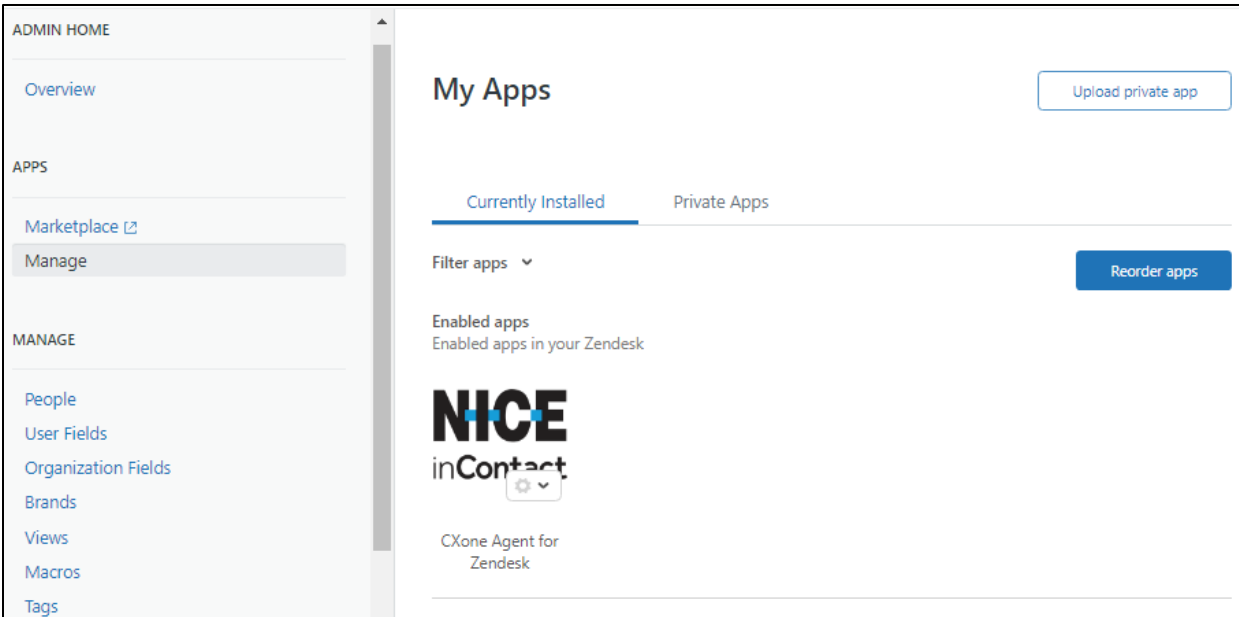
Establishing the initial connection from NICE InContact CXone to Zendesk with these steps.

1. Start by navigating to your NICE inContact CRM Console (accessible at console.niceincontact.com).
2. Select the **Company Settings** tab in the top navigation.
3. In the sub-navigation, select the **CRM** tab.
4. Select Zendesk as your CRM.
5. Enter the **Hostname** for your Zendesk instance, and the **Username** and **Password** for the designated administrator service user account. Reference the table above for information on these fields.
6. Click **Save**.

Upon saving, if the information provided is correct, NICE inContact CXone will test the connection and present a success message.

Install the CXone Agent for Zendesk

1. In the Zendesk platform, open the Admin menu by clicking the cog in the sidebar.
2. Click **Marketplace** under the **APPS** category to open the Zendesk Marketplace.
3. Search for "NICE inContact" in the search bar.
4. Click **Agent for Zendesk** to open the application's details page.
5. Click **Install**.



Change the Application Settings for CXone

Use the blow instructions to adjust the settings for your CXone Embedded Agent for Zendesk.

1. Navigate to the My Apps page in Zendesk (Admin cog in the sidebar → **Manage**). You will see CXone Agent for Zendesk under the **Currently Installed** category.
2. Click the settings down-chevron on the application icon to expand the settings options.
3. Select **Change Settings**.
4. Enter a **Title** for the agent application, which appears in the header of the application window.
5. Enter the **Application URL**, which is `https://app-crm.niceincontact.com/zendesk.html`. Confirm that this URL is the same that the NICE inContact implementation team provided you.
6. If you want to, you can enter the Zendesk password to use the Talk API suite feature of Zendesk.
6. If you want to, you can determine which user roles have access to the app by selecting the **Enable role restrictions?** radio button and selecting from the drop-down which roles you want to have access.
7. If you want to, you can determine which groups have access to the app by selecting the **Enable group restrictions?** radio button and selecting from the drop-down which roles you want to have access.
8. Click **Update**.

Advanced Options

These options do not necessarily need to be initially configured. The default values can be used for most integrations. Refer to the following table for information on the advanced options fields. If you make changes in these options, be sure to save your changes.

Field	Description
Digits to Match	Number of digits in a phone number that CXone will match against records in Zendesk. You may need to a custom configuration for certain international number formats.
Default Description Text for New Cases	You can enable the setting (see below) that automatically sends an email when a new case has been created in Zendesk. The content of this field will be the default text in these emails that are sent.
Send Email on Case Creation	Determines if Zendesk automatically sends an email when a new Case is created.