



USER GUIDE

Zendesk Integration with Bitrix24 Cloud

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OVERVIEW

Now you can coordinate the work of Zendesk technical support from Bitrix24 interface. Creating tickets, viewing all client tickets and specific ticket details allow you to be in complete control of all interactions with your clients directly from Bitrix24 CRM.



WHAT IS NEW

Feature description


The first version includes:

- 1) Ticket creation
Create a ticket directly from CRM details (Lead, Contact, Company).
- 2) List of client tickets
Browse the list and status of all tickets of the selected client.
- 3) Ticket details
Manage the work done for the ticket in a separate tab.

CONNECTING


 Your Zendesk is connected

Connect your Zendesk

Subdomain	<input type="text" value="ermashevsky"/>	.zendesk.com
Username (e-mail)	<input type="text" value="de@dev.info-expert.ru"/>	
API key 	<input type="text" value="vDdR6TlqW9Mtfnf2Q8hFOGfl7ONe2Gxz3nwUgy"/>	

CONNECT

When at the settings page, input your Zendesk account data:

- Sub.domain
- Username (e-mail)
- API key

If the connection is successful, you will see a “Your Zendesk is successfully connected” message.

If required, you can connect another Zendesk account to Bitrix24 at the application settings page (“Settings” button).

Obtain API Key:

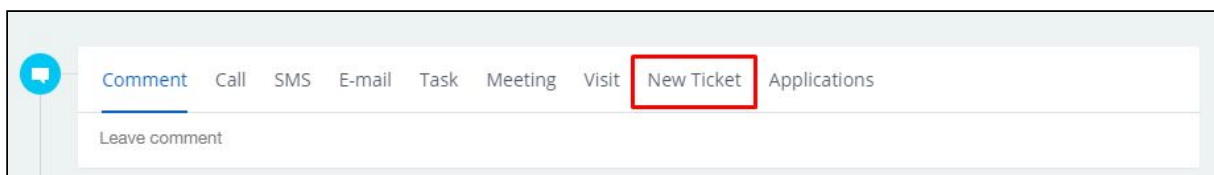
- *Go to Settings in Zendesk*
- *Select Channels > API*
- *Enable Token Access*
- *Get your token*
- *Select Save*

CRM details (Lead, Contact, Company)

Ticket creation

Any Bitrix24 account user can create a ticket in Zendesk from Bitrix24 interface.

To do that, just go to CRM details (Lead, Contact or Company) and click on a “New Ticket” tab in the client activities section.



After that, a ticket creation form will open in a separate slider submenu.

The following fields must be filled out in the ticket creation form:

- Who submits the ticket (select a client on whose behalf the ticket will be created in Zendesk)
- Ticket topic
- Ticket message (in Zendesk's terms - comment)

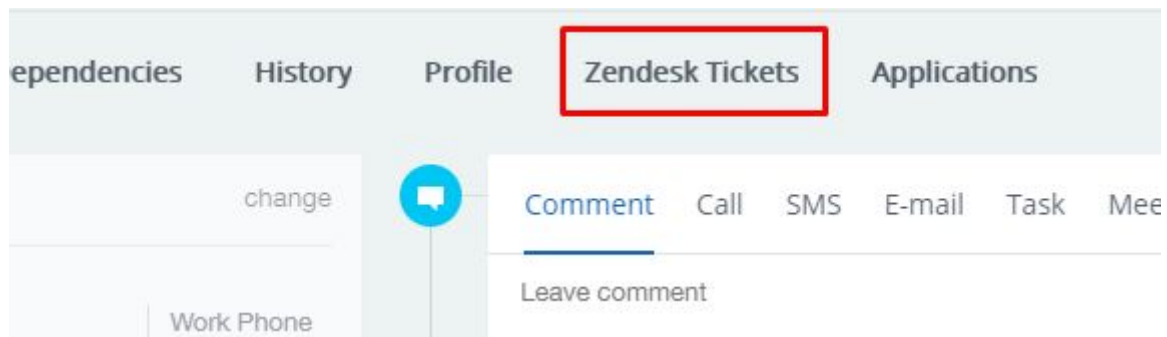
A ticket is created when clicking on a «Create ticket» button. The information about the created ticket is displayed in the client activity list.

Attention! A ticket can be created only for a Lead/Contact/Company that contains at least one e-mail.

Viewing the Client tickets list

Any user of your Bitrix24 account can view the list of all Zendesk tickets, issued by Zendesk Integration app via Bitrix24 interface.

To make that happen, simply go to CRM details (Lead, Contact or Company) and click on a “Zendesk Tickets” tab in the details menu.



After that, a table with the list of all tickets for this client will open in a separate CRM details tab.

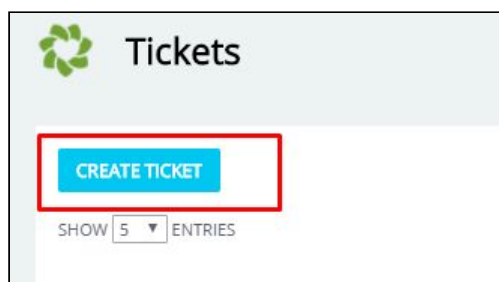
SUBJECT	REQUESTER	REQUESTED	TYPE	STATUS	PRIORITY
New ticket ...	John	2018/03/21	Incident	pending	

This table includes the following fields:

- Subject
- Requester
- Requested
- Type
- Status
- Priority

When clicking on a Subject hyperlink, you are switched to Zendesk and to the selected ticket.

The CRM details tab that contains the table/list of tickets also has a “Create ticket” button, that repeats functionality, described in the [Ticket Creation](#) subsection.



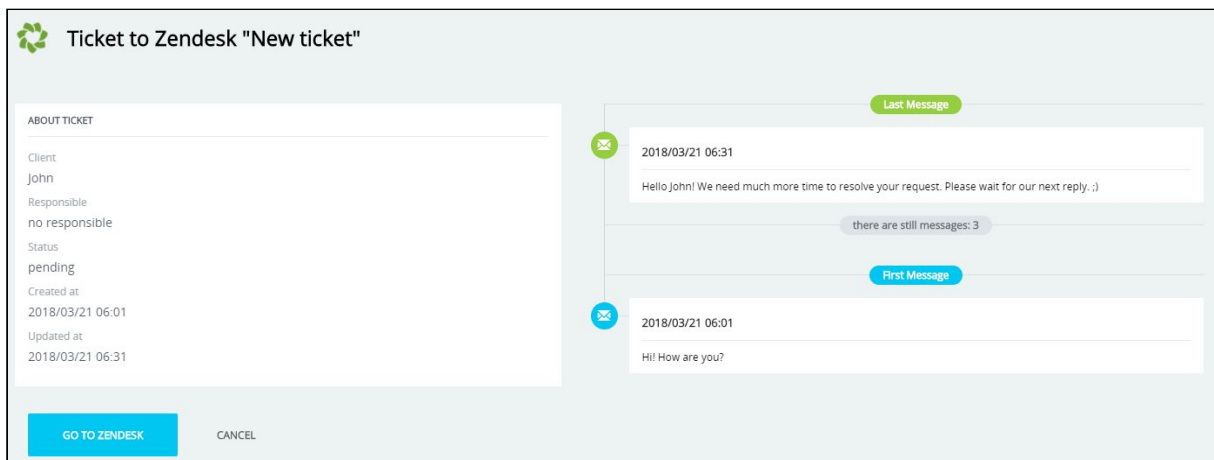
Ticket details

Any user of your Bitrix24 account can view the detailed information on the Zendesk ticket, issued by Zendesk Integration app via Bitrix24 interface.

To do that, click on a hyperlink in the client activities list.



Then, the ticket details for the selected ticket will open in a separate slider submenu.



The following information can be found in the ticket details:

- Ticket topic
- Client
- Responsible
- Status
- Created at
- Updated at (the date of the last response to the ticket)

ABOUT TICKET

Client
John

Responsible
no responsible

Status
pending

Created at
2018/03/21 06:01

Updated at
2018/03/21 06:31

- The last message inside the ticket
- The number of other messages in the ticket
- The first message in the ticket

Last Message

2018/03/21 06:31

Hello John! We need much more time to resolve your request. Please wait for our next reply. ;)

there are still messages: 3

First Message

2018/03/21 06:01

Hi! How are you?

Also, the ticket details has a «Go to Zendesk» button. One click, and it switches to the selected ticket inside Zendesk app.

GO TO ZENDESK

CANCEL

DOWNLOAD

Zendesk Integration app can be installed from inside your Bitrix24 account or [via public marketplace](#).



UNINSTALL

To uninstall the application from your Bitrix24 go to the Applications → My Apps → Zendesk Integration detail page and click on the delete button.

FEEDBACK

If you have any questions or proposals for adding new features, please write to us at info@bitrix24.com.