Zendesk CRM Integration

On this topic

Introduction

3CX provides out of the box integration with Zendesk. This integration shows the contact record on inbound calls, saving the call information by creating new and/or updating existing tickets. It also allows users to make calls to contacts directly from the Zendesk web interface.

Pre-requisites

- 3CX V15 PRO edition
- 3CX Client for Windows V15 installed
- Zendesk account.

Admin configuration of the Zendesk Integration

To download the plugin go to "Settings" > "CRM Integration" Page . From the "Available CRM Integrations" panel select Zendesk and press Download. To assign the Zendesk Plugin to an Extension go to the **"Extensions"** page and assign the Zendesk plugin to the Extension(s) of your choice.

User Configuration of the Zendesk Plugin

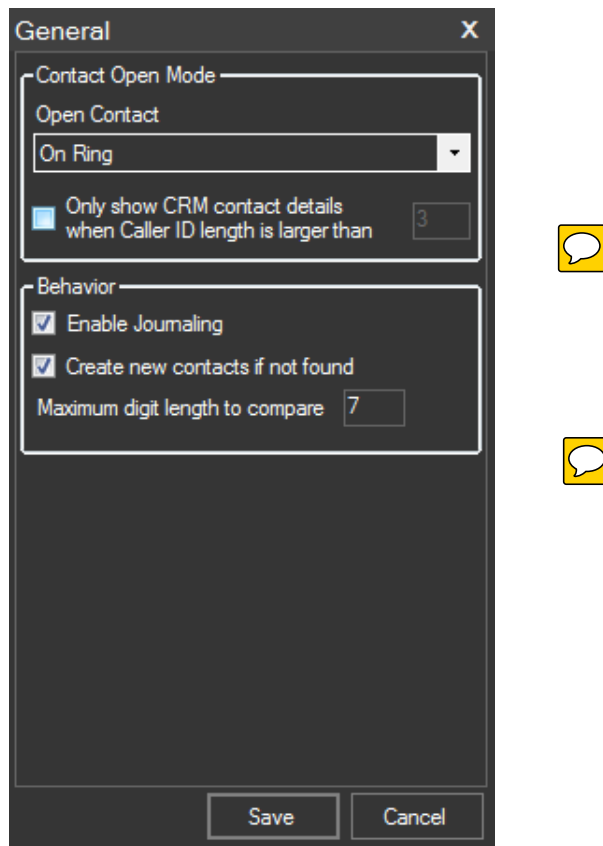From the 3CX client for Windows, press the **"Settings"** button.
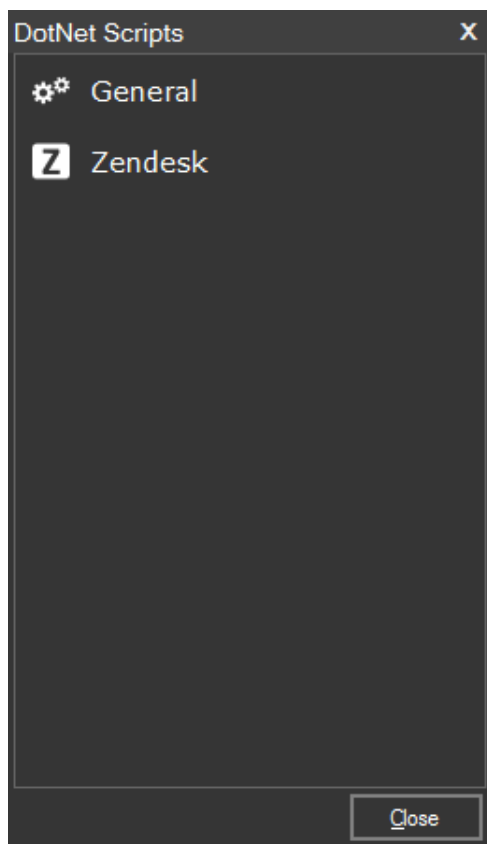
Select the **"Advanced Settings"** > **"Integration"**. The configuration dialog will be shown.

On the General settings you can configure the Contact Open Mode and the Behavior of the Plugin.

General configuration

Click on **"General"** to open the general settings page. Here you can configure when you want to open the contact record in Zendesk (on ring, on answer, or don't open it), and if you only want to open the contact record if the Caller ID length is larger than a number of digits (so it's not launched when another extension is calling you).
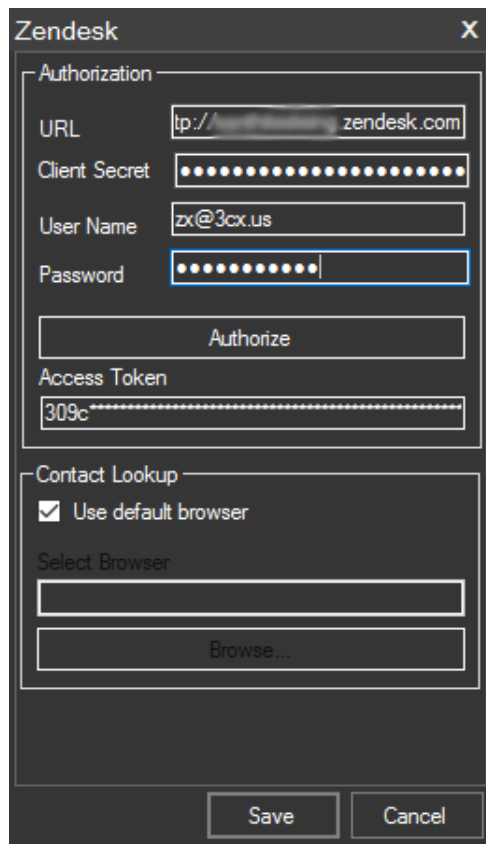
If you also want to automatically register the call activity by creating and updating tickets, you must check the **"Enable Journaling"** option. When this option is set, the plugin will add or update tickets containing information about the call, after the call has ended. If you want to create a new contact when the Caller ID is not found, just check the option.

In the **"Behavior"** section you can also change the maximum digit length to compare. When an inbound call arrives at your extension, the caller ID may have different formats depending on your PSTN or VoIP Provider. It could have an international format (including the country code), national format (including the region or city code), or local format (including only the local number).

Also, you may have created your contact's phone numbers in your Zendesk account with prefixes that are not present in the caller ID, such as mobile phone prefixes. In this case, to match the caller ID with the contact's phone number, you need to specify the maximum digit length to compare parameter. Usually this parameter should be the length of your local phone number.

The Zendesk plugin will compare the final number digits of the Caller ID with the final number digits that appear in your contact's phone number. If you configure this parameter to compare a high number of digits, there's a greater chance that the Caller ID will match up with the contact, but it's possible that the Caller ID will not always match up with some contacts. If you configure the maximum digit length to compare to a lower number of digits, you get less accuracy when matching the Caller ID with your contacts.

Zendesk configuration
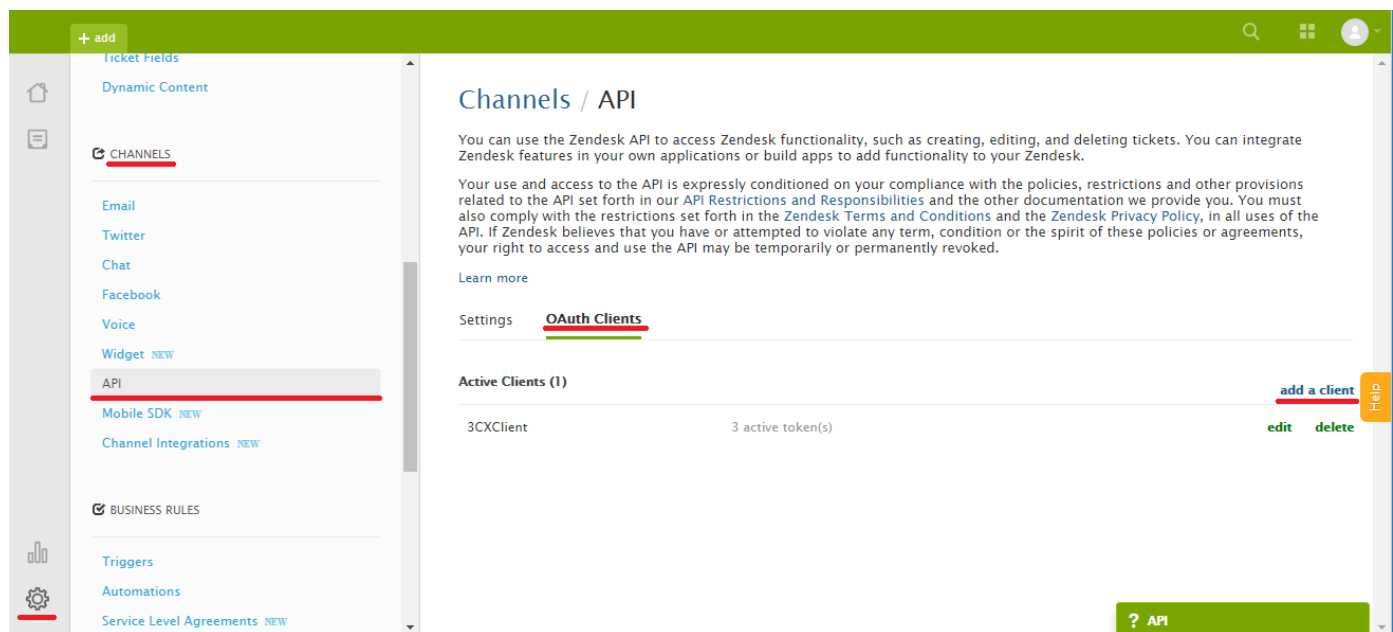
From the Zendesk settings you can configure your account credentials and authorize the plugin.

For the Zendesk configuration you will need the following:

1. Zendesk URL
2. Client Secret

To Authorize your account, configure the account credentials and press the **"Authorize"** button.

Create an OAuth Client

Login to your Zendesk account and click Manage (⚙).

Select API in the **"Channels"** category.

Click the **"OAuth Clients"** tab on the **"Channels/API"** page, and then click **"add a Client"** on the right side of the client list. Fill the following details for the 3CX application:

Name: 3CXClient

Unique Identifier: 3CXClient

Important: Take a note of the secret as it is displayed fully only once. After clicking Save only the first nine characters will be displayed.

After you finish configuring the Zendesk plugin, you need to restart the 3CX Client.

Configuration Outbound Calls

If you want to make outbound calls from Zendesk's web interface, you will need to download a file from 3CX and upload it to Zendesk.

Download 3CXZendesk Outbound dialer from here.

Login to Zendesk

Click **"Manage"** (⚙)

In the APPS category click **"Manage"**.

Press the **"Upload private app"** button.

Enter **"3CX Extension"** in the App Name field. Upload the zendeskoutbounddial.zip for the App file and press **"Upload"** button.

A message will appear **"Creating a new App"**. Press **"Upload"** to continue.

Creating a new App

Please be aware that the app you are attempting to upload has not been reviewed or approved by Zendesk for use in connection with your Zendesk account. Please also be aware of the following:

1. It may not operate as intended
2. If you have obtained this from a third party, it may have been developed in breach of our Terms of Service and Developer and API License
3. It may include malicious software which could materially or adversely impact your data and your Zendesk account
4. Any functionality associated with this App may be limited or disabled by future modifications to Zendesk

By clicking Upload, you agree to the above language and the Zendesk Marketplace Terms of Use.   Cancel   Upload

Once the file is uploaded the below message will appear. Press the **"Install"** button.

3CX Extension
this app shows user info

INSTALLATION

Title*

3CX Extension

☐ Enable role restrictions?

By installing this app you hereby agree to the Zendesk
Marketplace Terms of Use.

Cancel   **Install**

Important: **"Enable role restrictions?"** MUST be unchecked. If you, however, want to assign which users and roles should use the application then enable it and read here for more information.

Once the application is installed you can open a user's information page and press the **"Apps"** button on the right side of the page. You will be able to make a call just by clicking on a phone link.

You might also be interested in:

amoCRM Integration   How to test 3CX for Linux using Virtualbox   Freshdesk Integration – User Guide   Exact Integration – User Guide

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