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Introduction

xCALLY Shuttle provides a seamless CTI integration with Zendesk, the Cloud Help Desk solution for multi-channel customer cares.

Key benefits are really able to provides your customer care agents a Unified Agent Desktop experience, together with:
- Push CTI technology for automatic Ticket creation each time an Agent receive a call
- Trigger configuration to select with Asterisk Shuttle Queue are involved in the automatic Ticket pop-ups and which Events engage it: before answering, after answering or after a call hangup
- It WORKS either with EVERY KIND OF SIP PHONES registered on the Asterisk xCally Shuttle PBX, or the xCally phone bar, or the WebRTC client
- Great VoIP quality
- Great flexibility: use your own SIP trunk with your local providers or on the cloud according to your needs
- Totally Asterisk RealTime technology based
- Call Recordings option available on the Shuttle and Zendesk web interface
- IVR enabled: Cally Square drag and drop IVR totally integrated with Zendesk
- Simple and fast xCALLY Shuttle installer
- Many other nice benefits included

Watch this Video to see how the integration works
**Zendesk Integration**

In the **Setting** Menu there is a section dedicated to the integration of xCally Shuttle with third party applications, like Zendesk. You can find this section by clicking on the **Integrations** sub-menu, like shown in this image.

In the **Integrations** page there is the list of the Integrations already created and the possibility to create, edit or delete them and to check if the Integration Connection it’s valid through the **Check Connection** button.

Instead, in the **Triggers** page you can set how and when the integration works, thanks to the creation of different Triggers.
**Zendesk Integration**

**Create a new Integration**

To create a new Integration click on the button [New Integration] and fill the form with the following informations:

You can choose a **Name** which represents the Integration and then fill the **Username** and **Password** fields, which require the same username and password of an **Administrator** Zendesk Account.

Then compile the **URI** field with your Zendesk URL, written as https://.../api/v2/ (for example https://xcally.zendesk.com/api/v2/), and the Integration **Type**, in this case selecting Zendesk from the dropdown menu.

After the form submit you can see your new Integration shown in the Integrations table.

Through the Integrations Table you can quickly:
- edit the Integration parameters [Edit]
- delete the Integration [Delete]
Zendesk Integration

Create a Trigger

Now let’s focus on the **Triggers Section**: here you can set how the integration works by adding a new Trigger. To create it click on **+ New Trigger** and choose your integration strategy filling the form:

Through the **Event** field you can decide when the integration starts, so when the Zendesk ticket (dedicated to the actual call, which includes all the relevant fields of the caller) will be created:

- **Ringing**: when the phone is ringing, before the agent’s answer
- **Up**: when the agent picks up the call
- **Hang up**: when the agent hangs up the call
- **Unmanaged call**: when the caller has hang up before talking with an agent

You can also choose for which **Queue** the integration is valid. If you need to apply the Integration on more queues, you have to create one trigger for each queue.

In the last field you can select the integration type.

You can also set which **Tags** will be associated to the Zendesk Tickets opened by the integration. The tags can be created into the xCALLY Shuttle -> Settings -> Tags section.

After the creation of the Trigger you can edit parameters **Edit** or remove it **Delete**.

**Zendesk Integration**

**Unmanaged Calls Trigger**
In addition to the Ringing, Up and Hang up event, it is possible to create an Integration Trigger associated to the event Unmanaged Calls (when the customer hangs up the call without talking with the agent). The integration will open a ticket containing the customer phone number and basic data about the caller. The ticked can be later recognized looking at the Zendesk Tag=unmanaged, so the supervisors will be able to create proper Zendesk Triggers and Automations to manage the ticket according to their needs.

**Zendesk Insights**
It is now possible to trigger and tag the voice and the unmanaged calls, so to have the Zendesk Insight Reports to show you the call distribution status.
 Zendesk Integration

Important
The integration between xCally Shuttle and Zendesk uses the new Shuttle Push Technology in order to speed the Ticket creation and agent pop-up.
In order to have it working properly you need to be sure that:

1. the Agent Name in the Zendesk profile corresponds exactly to the Agent Caller-ID name in the xCally Shuttle Agent profile (SIP details), like shown in the image below.

2. The Agent is associated to a Group, in the Zendesk Agent Profile. Administrators can create Groups and associate Agents to them.

https://support.zendesk.com/entries/20047256-Creating-managing-and-using-groups

If the agent or admin user is not associated with any GROUP, the Ticket will NOT be created!
Zendesk Integration

3. the Agent MUST have a Zendesk role different from Administrator and End User. It must have one of the Zendesk Agent Roles. If the Agent is associated with an Administrator or an End User account, he will not be able to see the automatic Ticket creation!

https://support.zendesk.com/entries/20055812-Understanding-Zendesk-user-roles
**Zendesk Integration**

**Hints**

**xCALLY phone bars:** if you use the xCALLY phone bars, you just need to create the Agents, being careful to fill in with the **Name** same as your **Zendesk AGENT NAME**. Do not touch the Caller-ID SIP created field (it will be automatically generated with the right value to make the integration working).

**External IP phones:** if you use external IP phones, or experimental WebRTC, you just need to create the Agents, being careful to fill in with the **Name** same as your **Zendesk AGENT NAME**. Afterwards, just link the Agent to the SIP username related to your external IP phone. The Caller-ID SIP field and the entire SIP related account, can be modified later on without any impact.
Zendesk Integration

Custom fields
Custom ticket fields are typically used to gather more information about the support issue or product or service in Zendesk.
Each Zendesk custom field is associated to one ID.
Using Shuttle you can now create a MAPPING between the Zendesk custom field ID and the available field values.

In order to do it just enter in the Shuttle administration web interface -> Section Integrations and add your custom field mapping in the CUSTOM FIELDS sub-section clicking on +New Custom Field.

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<tr>
<td>ID *</td>
</tr>
<tr>
<td>Prefix</td>
</tr>
<tr>
<td>Field From</td>
</tr>
<tr>
<td>Suffix</td>
</tr>
<tr>
<td>Integration Zend xCALLY</td>
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Fill the form with the requested informations:
- Custom Field ID: Zendesk Custom Field ID (the image on the next page indicates how to retrieve it)
- Prefix: String prefix
- Available Fields
  - From: Caller
  - To: Called
  - Id: Caller ID Zendesk
  - Name: Caller Name
  - Queue: Shuttle Queue
  - Position: Queue’s Position
  - Count: Queue’s Count
  - Trunk: Shuttle Trunk
  - Suffix: String Suffix
  - Integration: Integration Name
- Date: Enter Time Call
- Unique ID: Asterisk Unique ID Call
- Recording Link: Link Recorded Call
- SIP: Shuttle SIP
- Agent: Shuttle Agent
Zendesk Integration

Here it is a mapping example:

Through the Custom Fields table it’s possible to:
- delete a custom field, with a click on the button
- change the parameters specified in the creation of the custom field, by clicking on
Zendesk Integration

Here it is the result: your agents will get the ticket pop-up with the custom fields auto-filled.

Restricted fields (not recommended)

This option is DEPRECATED.
If you select Restricted field (not recommended) you will get a Zendesk ticket with fixed field information (fixed phone number prefixes and fixed number of fields) and the recording control image (not usable with .gsm compressed recording).

This feature is still supported, however we do not recommend to check it, due to the above limitations.
Zendesk Integration

Custom Variables
In the Settings -> Integrations there is a new submenu where you can create Custom Variables to be used in the Cally Square section when designing the IVR structure. In this way you can pass useful data to the integrated 3rd party applications.

Click on the New Custom Variable button and fill the form with the Name and the Alias. In order to use the variable, you have to select Active, as shown in the image below.

The image below shows an example of how you can use the Custom Variable in the IVR structure:
Zendesk Integration

The Result
Here the result in Zendesk: the **order number** is shown in the Additional Info section of the ticket.
Zendesk Integration

Zendesk Outbound CTI Integration
The xCALLY - Zendesk Integration can be also applied to an Outbound Route: a ticket is created and shown through a pop-up every time an Agent starts a call.

First of all, you need to have an Integration already created (Settings -> Integrations menu).
Then you have to go to the Dial Plan -> Outbound section, click on edit on the route of interest, go under the General Settings and choose the Integration from the list.

In case you enable the Zendesk integration for outbound call rules, please note one Ticket pop-up will be presented to the agent, for each OUTBOUND CALL TENTATIVE, independently from the outbound call result (busy, congestion, answer etc...!)

The result
When the Agents starts an outbound call, the ticket pop-up, with all the main information, will be shown in his Zendesk interface.
Zendesk Integration

Troubleshooting
The Integration doesn’t work? Check carefully the following steps:

1. Check if:
   - the username and password correspond to a valid Zendesk Admin Integration Account
   - the Zendesk URI is correct.

2. The Agent is correctly associated to the Queue specified in the Trigger that you created (xCally Shuttle - Integration Settings).

3. The Agent Name in the Zendesk profile corresponds exactly to the Agent Name in the xCally Shuttle Agent profile.

4. The Agent is associated to a Group, in the Zendesk Agent Profile.  
   **If the agent or admin user is not associated with any GROUP, the Ticket will NOT be created!**

5. The Agent has a Zendesk Role different from Administrator and End User.

Questions? Doubts?
Ask to our Shuttle Community!
Shuttle SSL https usage

To set xCALLY in the **https** secure connection go to the xCALLY Shuttle Settings -> General -> **Secure Connection** and set Yes. After this change you have to reset the xcally-realtime service, using the command `service xcally-realtime restart`. When you access to the xCALLY URL for the first time, you have also to accept the website certificate.
Advanced Experimental Zendesk Integration

The xCALLY powerful Web Workspace console can be embedded and displayed into the Zendesk interface through the following steps:

- Set xCALLY in the **https Secure Connection**, as described in the *Shuttle SSL Https Usage* section. This step is necessary because only in that way the integration can work properly.
- Go to the Zendesk Settings -> Apps -> **Marketplace**
- Search the **Sidebar Icon app** and install it

- Go to the Zendesk Settings -> Apps -> **Manage**
- Select **Change Settings**, in the Sidebar Icon Settings dropdown menu. Here you have to define the iframe URL, typing the xCALLY Shuttle **https URL**, and then the icon images for the inactive, hover and selected status.
Advanced Experimental Zendesk Integration

When the Sidebar Icon is enabled you can see your custom icon on the Zendesk navigation bar and quickly access to the xCALLY Shuttle web interface by clicking on it.

**Important**: before using the xCALLY Shuttle web interface through Zendesk for the first time, we suggest you to access directly to xCALLY by the https URL to correctly enable permissions.