Phone Manager
Application Support - Zendesk

∞ Mitel

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Mitel Phone Manager
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Zendesk

Overview

Zendesk is an online ticket/customer support CRM; this Document describes the features that are available when integrating Phone Manager with Zendesk. Zendesk by default only supports one 'Phone' field for storing a telephone number; this is the field that is searched when attempting to find a contact.

Supported Versions

As Zendesk is an online product they have no concept of a version numbering scheme. Phone Manager integration was tested against the Zendesk V2 API.

Features

Integration with Zendesk supports the features listed below:

- Screen pop for contacts/open tickets

Screen pop

'end-user' people or their open tickets can be screen popped when an incoming call is received using the caller id (CLI) from the inbound call or the dialled number on an outbound call. For example an inbound call is received from 07718402534, if there are no tickets currently open for this 'end-user' then their user profile is displayed.
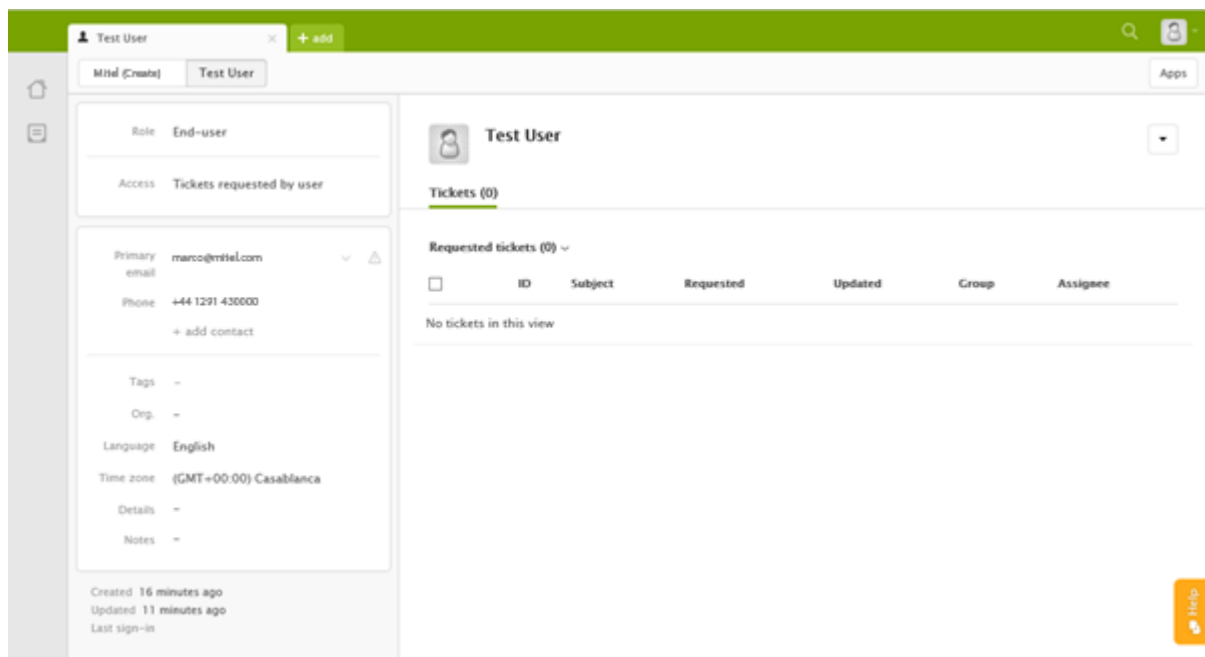
If multiple matches are found then the Multiple Contact Found dialog is shown:
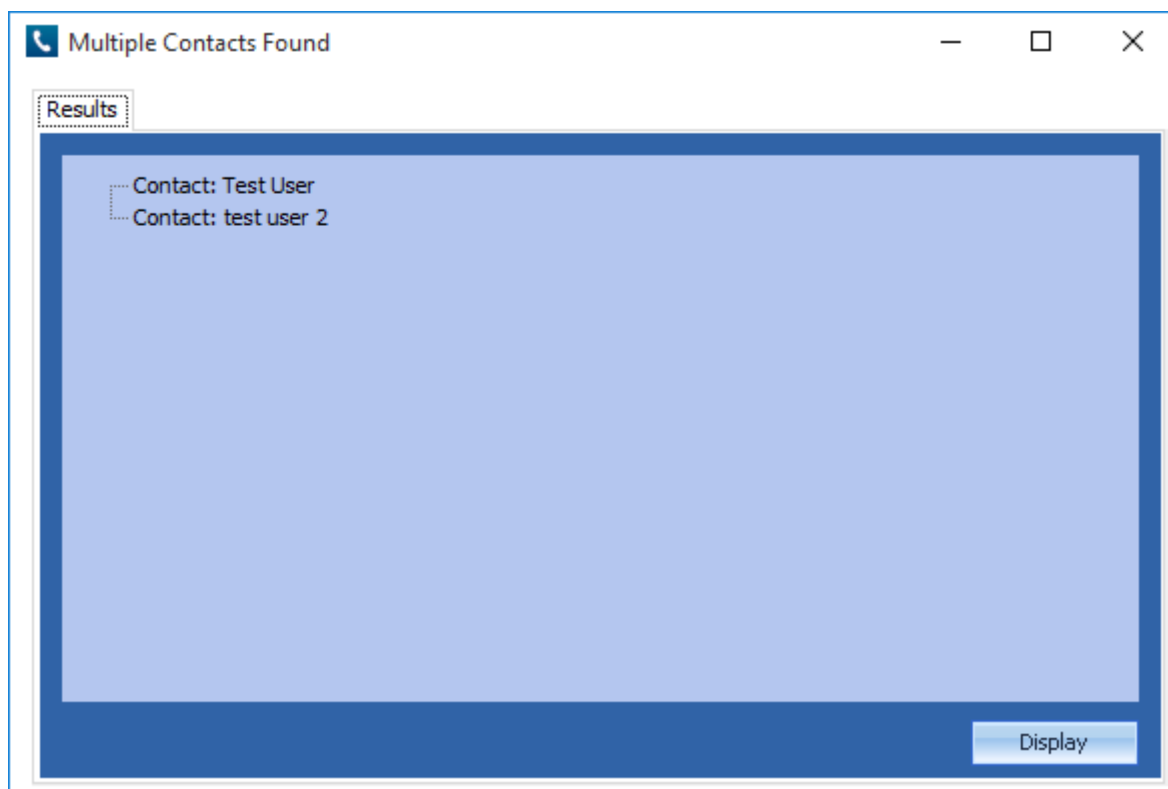
The Multiple Contact Found dialog will also be shown if the 'Search Open tickets on Contact Match' setting is enabled in the Phone Manager Plugin. The dialog will allow the selection of the specific ticket item to display:
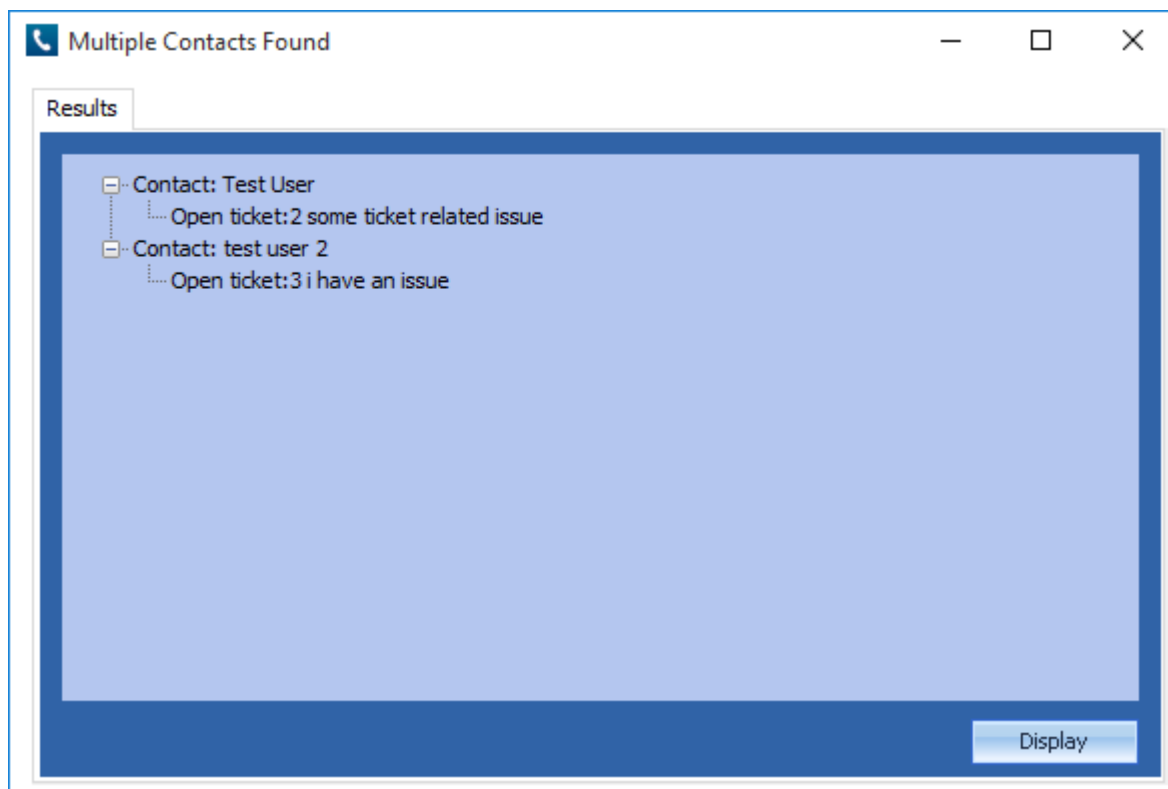
Configuration

The integration requires the Zendesk URL and authentication credentials for the user. User password or authentication token can be used; these are setup on the Zendesk administration by your administrator in the settings/channel/API section of the Zendesk configuration.

The option to search for tickets and whether to open the screen pop in a new browser window or in the same logged in session as selected in the setting tab of the integration, there is also a 'Test' button which will test whether the configured URL and user credentials are correct.

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