

# 5.3 Zendesk Integration Guide

## Bright Pattern Documentation

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# About

Bright Pattern Contact Center omnichannel cloud call center software integrates with Zendesk applications to help you manage increasing contact volume, provide better service to your customers, and increase agent productivity and performance.

Similar to Bright Pattern software, Zendesk applications offer live chat, messaging, talk services, and analysis and reporting. Zendesk interfaces directly with Bright Pattern, so that contact centers using Zendesk can take advantage of Bright Pattern's features without losing their existing data records and contacts.

This Bright Pattern Contact Center [Zendesk Integration Guide](#) provides detailed descriptions of Zendesk integration features, as well as instructions for setting up your Bright Pattern Contact Center to function in an integrated manner with your Zendesk applications.

## Features and Benefits

Zendesk integration provides everything you need to implement a model Zendesk Call Center, including the following:

- Zendesk phone integration
- Zendesk chat
- Zendesk SMS
- Integrated Agent Desktop

[Zendesk integration icons](#)



## Zendesk Phone Integration

The integrated phone system is powered by Zendesk Interactive Voice Response (IVR) technology for customer recognition and self-service, voicemail tickets, and more. Zendesk IVR automates common or frequently performed telephone transactions by means of a computer interacting with a person by playing prompts and responding to touch-tone or voice input.

When integrated with Bright Pattern Contact Center software, your business can keep running even outside of normal hours of operation. For example, Zendesk phone integration allows you to do the following, and more:

- Reduce staffing requirements with multimedia interaction queuing, which spreads load peaks.
- Automate frequent requests with multimedia interaction scenarios used to provide self-service.
- Provide after-hours automated answering service, and create tickets from voicemail.

## Zendesk Chat and SMS

Rich contact channels and powerful tools such as Zendesk chat and Zendesk SMS make it easier for customers to reach you by offering service over rich web chat, SMS, social messengers, and mobile apps.

Zendesk chat provides push routing, multiple concurrent chats on agent, Facebook Messenger, SMS and other messaging, and customer identification. Likewise, Zendesk SMS lets you handle customer inquiries over SMS as chat, send reference information via SMS on a call, process post-call surveys via SMS integrated with Zendesk, and more.

### [Zendesk integration scenario](#)

Customers and service providers benefit in so many ways:

- Customers can text Customer Support from a public place, such as a train or a doctor's waiting room, privately, making use of otherwise lost time.
- A customer doesn't have to wait on the phone when contacting through SMS or mobile apps--they can go about their business and get alerted when an agent is available.
- Thanks to SMS messaging on Agent Desktop, customers don't have to write things down on a call.
- Based on the data in Zendesk, customers are recognized automatically.
- Customers can be serviced in priority order, with priority derived from the data in Zendesk.
- Service quality is better managed with call and interaction recording and grading.
- Customers don't have to repeat their information on transfer, as the information on screen always follows the interaction.

## **Integrated Agent Desktop**

The integrated Agent Desktop user interface helps to increase agent productivity. Featuring a built-in softphone, screen pop, click to call, activity history, and a convenient user interface, it is optimized to minimize clutter while keeping functions at close reach. Conveniently, it displays only the controls and information needed at each point of work.

## Zendesk Integration Agent Desktop

With Agent Desktop integrated with Zendesk, you can work more efficiently:

- Drive tickets to resolution faster with internal chat between agents and supervisors.
- Dispatch repetitive tasks quickly with knowledge base, canned responses for chat, and click-to-play personal pre-recorded messages.
- Recognize and prioritize customers and screen pop tickets with multi-media interaction scenarios driving customer identification
- Dial customers' phones with a single click using built-in software telephone featuring click-to-call.
- Have context of past conversations at the agent's fingertips with call activity history saved in ticket log, including call recordings and voicemails.
- Gain insights on agent performance with real-time operations displays and historical interaction reports.

Use the Bright Pattern Contact Center [Zendesk Integration Guide](#) to learn more about and take advantage of the many benefits of Zendesk integration.

## Audience

The *Zendesk Integration Guide* is intended for the IT and/or technical personnel responsible for the data infrastructure of the contact centers that use Bright Pattern Contact Center solutions for customer interaction processing and Zendesk applications for customer relationship management. Readers of this guide are expected to have experience in administration of the above systems, as well as a solid understanding of contact center operations and resources that are involved in such operations.

# Scope

The *Zendesk Integration Guide* discusses the following aspects of [Zendesk integrations](#):

- [Zendesk Integration Setup](#)
  - How to Set Up the Integrated Agent Desktop
- [Single Sign-On Setup](#)
- [Screen-Pop](#)
  - Configuring Screen-Pop
- [Accessing Zendesk Data from Scenarios](#)
- [Integrated Agent Desktop](#)
- [Built-In Softphone and Click-to-Call](#)
  - Zendesk Softphone
  - Using the Dialpad
  - Click-to-Call functionality
- [Live Chat and SMS](#)
  - Example Chat
- [Activity History](#)
  - Becoming Familiar with Activity History
  - Linked Interaction Data
  - Default Settings and Customization Options
  - Writing Activity History to Specific Zendesk Tickets
  - Handling Multiple Interactions
- [Call Center Supervisor](#)
- [Using Zendesk Integration Scenario Blocks](#)
  - Example Scenario

## Prerequisites

- Zendesk integration requires that you have admin-level access to both Bright Pattern Contact Center and Zendesk systems.
- In addition to access to all regular agent functions, you must have the privilege **Use Zendesk**. (Refer to the Contact Center Administrator application > *Roles* > [Interaction Handling group of privileges](#).)
- All users of the integrated Zendesk/Bright Pattern desktop must have accounts in both systems. For Single Sign-On, these users must have the same email address in both systems. (In the Bright Pattern Contact Center, the user's email address is configured via the *Users* > *Contacts* tab of the Contact Center Administrator application.)


- For types of integration described in this document, Bright Pattern Contact Center version 3.9 or later is required.
- Your service provider should be notified if you plan on using a Zendesk integration with your contact center.

## Zendesk Integration Setup

When the Bright Pattern Contact Center is integrated with Zendesk, your Bright Pattern Agent Desktop is essentially embedded into the Zendesk environment. From one integrated Agent Desktop interface, you have direct access to Zendesk application features such as the phone, live chat, SMS, mobile messenger apps, customer and agent records, interaction details, and more.

### How to Set Up the Integrated Agent Desktop

#### Step 1: Log in and navigate to *Apps*

1. Log into your Zendesk application.
2. Click the Admin icon .
3. Go to the *Apps > Marketplace* page.



Apps > Marketplace

#### Step 2: Begin application installation

1. Select the [Bright Pattern Cloud Contact Center application](#) (also known as Omni-channel Cloud Contact Center for Zendesk).
2. Click **Install**.

If you cannot find this application in Zendesk Marketplace, you can request it from Bright Pattern Support. You will receive a .zip file. Upload this file via *Apps > Manage > Upload App* and click **Install App**.



[Zendesk-marketplace-3.png](#)



### Step 3: Link the app to your Agent Desktop

1. In the form that appears, specify the URL that you normally use to open your Bright Pattern Contact Center Agent Desktop application.
2. Use the following format for the URL: *http://<tenant\_name>/agentdesktop/Zendesk.jsp*

### Step 4: Review ticket assignments and adjust if needed

1. By default, current ticket assignments are not affected by customer interaction delivery (i.e., routing or transferring) to specific agents.
2. Select the **Assign tickets on screen-pop** checkbox if you want the system to automatically assign screen-pop tickets to the agents receiving corresponding interactions.

### Step 5: Set roles to determine who can access the integrated desktop

1. Leave the **Enable role restrictions** checkbox unchecked if you intend to provide an integrated desktop to all internal Zendesk users regardless of their roles.
2. Alternatively, select the **Enable role restrictions** checkbox and choose the roles of users who will have access to the integrated desktop. (Hold your keyboard's **Ctrl** button to select multiple roles.)

### Step 6: Customize the size of the Agent Desktop widget

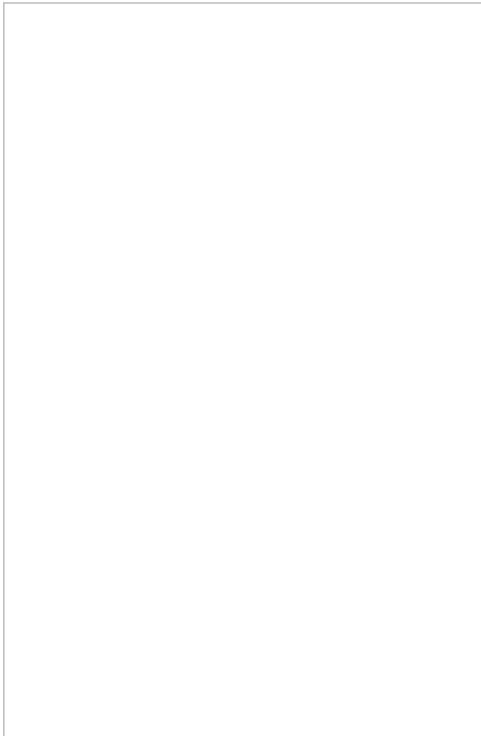
1. Notice the the Bright Pattern Contact Center Agent Desktop widget shown in the top-right section of the integrated desktop, and adjust its size if needed. The default size is optimized to make the interaction handling controls clearly visible to the agent while taking up as little Zendesk application screen space as

possible. It is a good idea to try it with the default size setting before applying any changes.

2. If you do need to adjust the widget size, do so by changing the Agent Desktop widget's width and height parameters.

## Step 7: Confirm that you set up the app correctly

Click **Update**. You should now be able to see the Bright Pattern Contact Center Agent Desktop widget with a login dialog. If you do not, then go back and try reinstalling the app.



## Step 8: Log in with your Bright Pattern Contact Center credentials

By default, you log in with a [softphone](#). To choose another device, click the current **Phone device** setting and select the desired type of device. For more information about the available device options, see section [Selecting a Phone Device](#) of the *Agent Guide*.

Note that if this is your first login into the Bright Pattern Contact Center on the given computer, you will be prompted to [install the Agent Desktop Helper Application](#).

The Bright Pattern Contact Center Agent Desktop widget will now show a standard set of telephony controls available to a contact center agent. For more information about these controls see the *Agent Guide*. Note that the appearance of these controls has been modified to match the overall look and feel of Zendesk.

To minimize the Bright Pattern Contact Center Agent Desktop Window, click the icon directly above it. When you are logged on, this icon reflects your agent state (or your presence state if you are not an agent). For example, when you are in the *Ready* state, the icon will look like this: . Agent states and corresponding icons are explained in section [How to Interpret Your Current State Information](#) of the *Agent Guide*.

If you receive a new interaction, you will see the same interaction alert window that you would normally see in the Bright Pattern Contact Center Agent Desktop. You will be able to accept an interaction even if your Bright Pattern Contact Center Agent Desktop window is minimized.

## Single Sign-On Setup

The Single Sign-On (SSO) function enables you to log in to just one application to use your integrated Zendesk desktop interface. You do not have to sign in to both the Bright Pattern Contact Center *and* Zendesk too. Thanks to SSO functionality, logging in to the Bright Pattern Contact Center logs you in to Zendesk as well, for a truly seamless experience.

### How to Set Up SSO

#### Step 1: Log in to change your settings.

- Log into your Zendesk application.
- Click the Admin icon .
- Go to the *Settings* > *Security* page.

#### Step 2: Activate SSO functionality.

- Click **Single Sign-on**.
- Select the **JSON Web Token** checkbox.

[Zendesk-integration-guide-image10.png](#)



### Step 3: Set up remote login/logout.

- Set **Remote login URL** to *https://<tenant-name>.<service-provider-domain-name>/agentdesktop?zin=true*
- Set **Remote logout URL** to *https://<tenant-name>.<service-provider-domain-name>/agentdesktop?zout=true*

### Step 4: Enable sharing between you and Zendesk.

- Select the content of the **Shared Secret** field and copy it to the clipboard.
- Click **Save**.

### Step 5: Add Zendesk as a new integrated account.

- Open the Bright Pattern Contact Center Administrator application.
- Go to [Call Center Configuration > Integration Accounts](#).
- Click **Add account**.
- Select **Zendesk**.
- Click **OK**.

### Step 6: Name your new integrated Zendesk account.

- Create a **Name** for this integration account.

### Step 7: Link the account you just created to Zendesk.

- Paste the clipboard content to the **Shared secret** field.
- Copy your Zendesk domain URL and paste it to the **URL** field.
- Click **Apply**.

[Zendesk-integration-guide-image11.png](#)



### Step 8: Test the SSO functionality and confirm it works.

- Sign out of Zendesk. You will be redirected to the Bright Pattern Contact Center Agent Desktop login page.

- Log in with your Bright Pattern Contact Center credentials. You should be simultaneously logged on to both Zendesk and Bright Pattern systems.

From this moment, every time you enter the URL of your Zendesk desktop, you will be redirected to the Bright Pattern Contact Center Agent Desktop login page for a single sign-on (SSO).

To log into Zendesk directly (without a simultaneous login to Bright Pattern), use the following URL:

*<https://<zendesk-domain-name>/access/normal>*

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## Screen-Pop

Screen-Pop is a useful feature that automatically pushes relevant data about a customer or ticket to the agent who is handling the interaction. This feature may be used to facilitate better customer interactions, as well as to launch outbound campaigns.

If you are running a business, chances are that you will plan an outbound campaign service or two. A campaign is a type of service in which a contact center proactively initiates interactions with customers for a specific reason, such as for surveys or telemarketing, using destination data in the associated calling list(s). An outbound preview campaign distributes relevant calling records and caller data directly to agents for preview--before the campaign is kicked off.

One way to distribute that data to agents is through the **Screen-Pop** feature, which literally pops targeted Zendesk data onto the Agent Desktop screen. When you launch your next outbound preview campaign, give agents the useful information they need, before they dive into a sea of calls.

## Configuring Screen-Pop

To configure Zendesk data screen-pop for an outbound preview campaign, first make sure you have followed the previous steps to setting up Zendesk integration. Then follow these steps:

### Step 1: Confirm that your Zendesk calling records include necessary Zendesk object identifiers.

Before importing a calling list that will be used in this campaign, make sure it contains identifiers (e.g., first name, last name, phone number, and so forth) of the Zendesk objects that are to be displayed on the Agent Desktop when the corresponding calling records are distributed to the agent for preview. These identifiers must be obtained from Zendesk, where they are generated for every ticket and user object. If the calling list is missing the data required, the list will fail to be imported.

### Step 2: Name your calling list.

- When [importing this calling list](#), assign type **Other** to the field containing the Zendesk identifier.
- Give it a descriptive name (e.g., **ZendeskID**).

### Step 3: Tell the Screen-Pop feature which calling list to grab.

- When [configuring the general properties of your preview campaign](#), set the **Screenpop URL** parameter to <https://yourdomain.zendesk.com/agent/tickets/<ID>>, where you replace "<ID>" with the actual name of the [Field

in your] calling list that you just imported. For example, if the name is "ZendeskID," then the Screenpop URL is *tickets/\$(workitem.otherInfo.ZenDeskID)* .

- Save your changes.

[Zendesk-preview-sceenpop-config-a2.png](#)



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## Accessing Zendesk Data from Scenarios

If you do not wish to configure your Bright Pattern Contact Center for Single Sign-On with Zendesk, you can access Zendesk data directly from Bright Pattern scenarios instead. The instructions that follow will walk you through the process.

Perform the following preliminary steps only if you skipped the [Single Sign-On](#) configuration process; otherwise, proceed directly to **Step 1**.

- Open the Bright Pattern Contact Center Administrator application.
- Go to [Call Center Configuration > Integration Accounts](#).
- Click **Add account**, select **Zendesk**, and click **OK**.
- Create a **Name** for this integration account.
- Copy your Zendesk domain URL and paste it to the **URL** field.
- Click **Apply** to save your changes.

### Step 1: Manage settings for your Zendesk API.

- In Zendesk, go to *Admin > Channels > API*.
- Make sure **Token Access** is enabled (i.e., checkbox selected).

- Click the **add new token** link.
- Enter a label for this new token and click **Create**. The new token will appear in the **Active API tokens** list.

[Zendesk-integration-guide-image12.png](#)



**Step 2: Save the new token.**

- From the **Active API tokens** list, select the new token and copy it to the clipboard.
- Click **Save**.

**Step 3: In the Bright Pattern Contact Center, set up access to the integrated Zendesk account.**

- In the Bright Pattern Contact Center Administrator application, go to [Call Center Configuration > Integration Accounts](#).
- Open the earlier created Zendesk account.
- Paste the clipboard content to the **API token** field.
- Select the **Default account** checkbox.
- In the **Username** field, specify username of the Zendesk account on whose behalf requests for Zendesk data from Bright Pattern scenarios will be made. Make sure this account has sufficient privileges to access all data that may be used in the Bright Pattern Contact Center IVR and routing applications.
- Click **Apply**.

[Zendesk-integration-guide-image13.png](#)



#### Step 4: Confirm your connection to Zendesk data.

Click the **Test connection** button. You should receive confirmation that the connection between the Bright Pattern Contact Center platform and Zendesk data repository is valid.

#### Step 5: Use scenario blocks to access Zendesk data.

To access Zendesk data and enable screen-pop, use the following blocks of the Bright Pattern Contact Center Scenario Builder application:

- [Zendesk Search](#) to obtain Zendesk data
- [Zendesk Create Object](#) to create new tickets and users in Zendesk
- [Zendesk Update Object](#) to update existing Zendesk tickets and users
- [Zendesk Screen Pop](#) to synchronize delivery of calls and related Zendesk records to the agents
- [Attached Data](#) to populate custom fields in Zendesk activity history

This *Zendesk Integration Guide* contains a [scenario example](#) that illustrates how the Search and Screen Pop blocks can be used to obtain Zendesk data and display it to the agent upon interaction delivery.

Note that you can create multiple Zendesk integration accounts for access to different Zendesk systems. If you have multiple integration accounts, use scenario block [Zendesk Select Account](#) to specify the integration account that will be used by Zendesk blocks in the given scenario. If this block is not used, all Zendesk blocks in the given scenario will use access data from the integration account marked as **Default account**. (See **Step 3**.)

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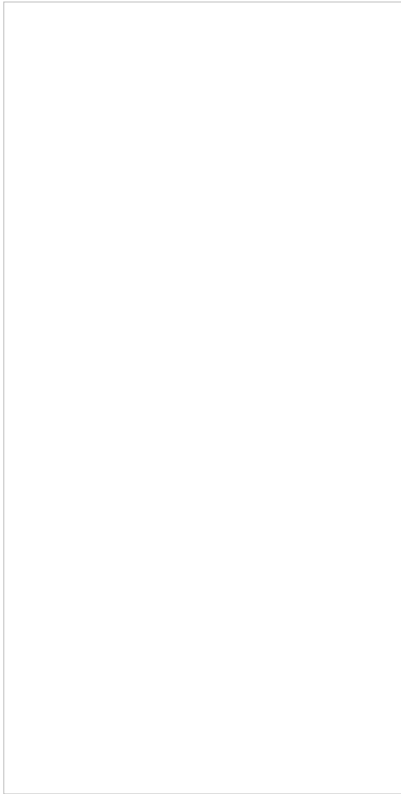
## Integrated Agent Desktop




The integrated Agent Desktop user interface is the same as the Bright Pattern Contact Center Agent Desktop application, but with the look and feel of the Zendesk environment. Designed to increase agent productivity, the integrated Agent Desktop displays only the controls and information needed at each point of work. Agents and supervisors can work more efficiently using the integrated desktop's softphone, live chat/texting/messaging services, cross-functionality with Zendesk data records, and real-time tracking of customer interactions.

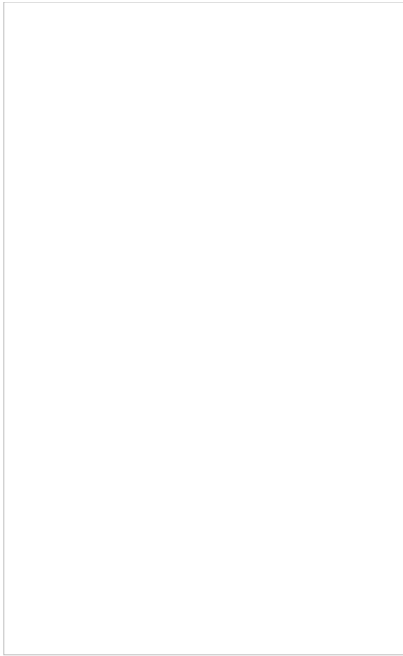
## Phone

A built-in **software telephone** enables inbound/outbound calls, voicemail, and so forth.



## Click Once to Call

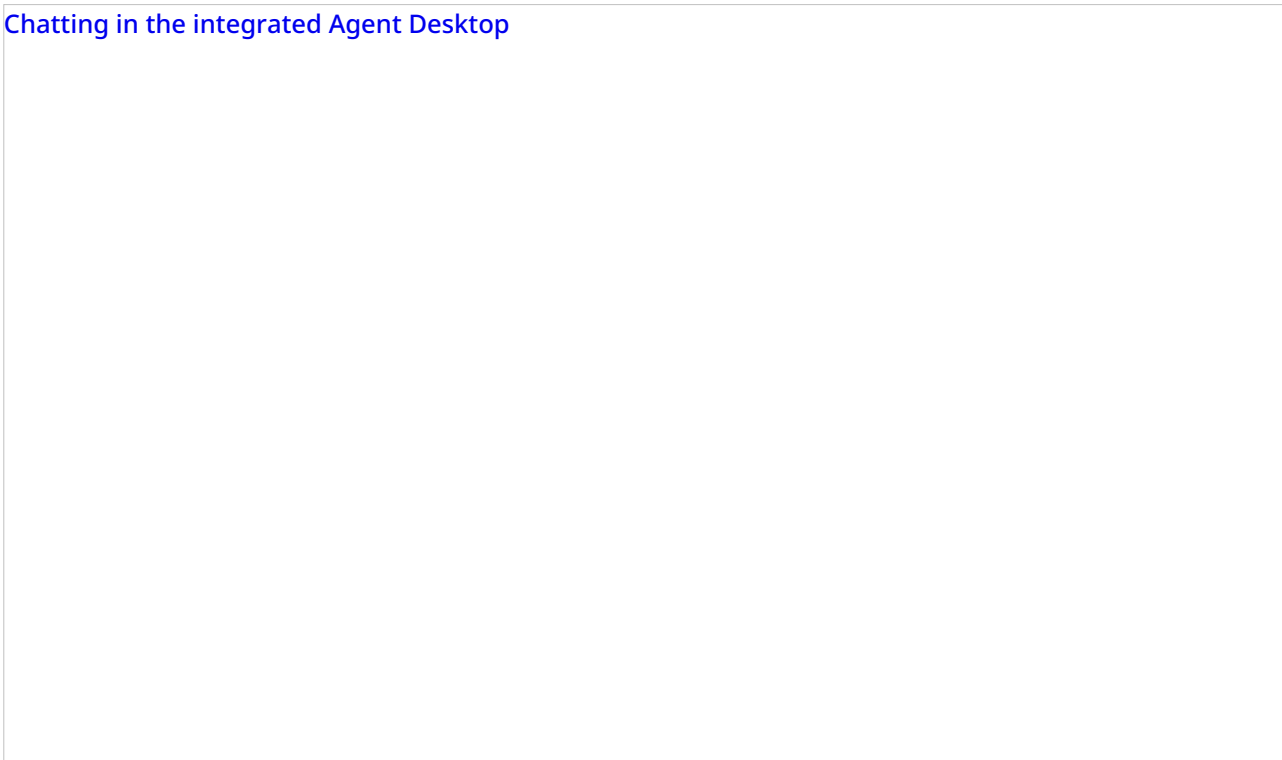
**Click-to-Call** functionality allows agents to dial customers' phones with a single click. Simply click the Click-to-Call icon  next to a name.



## Chat, Text, Message, and More

**Live chat, SMS, and Mobile Messenger app** services make it easy to communicate and exchange data with customers, agents, and supervisors.

[Chatting in the integrated Agent Desktop](#)



## Interaction Information Saved Automatically

**Activity history** provides real-time operations displays, information about conversations, saved ticket logs, call recordings, and voicemails, all from the center of the screen.

Activity history shown in the integrated Agent Desktop



## Instantly Access Zendesk Data

Tapping into **Zendesk data** records from the integrated desktop enables agents, supervisors, or administrators to set up campaigns, caller lists, screen-pop, and more. **Screen-Pop** functionality lets agents access relevant Zendesk data during an interaction, on the fly.

Refer to the Bright Pattern Contact Center [Agent Guide](#) to learn more about the Agent Desktop user interface and its applications.

## Built-In Softphone and Click-to-Call

Inbound calls, outbound calls, voicemails, and recorded calls are at your service. From the integrated Agent Desktop, you can accept or reject calls, dial out, place internal calls to other agents or supervisors, monitor call activity, and much more.

The built-in softphone and its inherent functions is part of an integrated phone system offering customer recognition and self-service, voicemail tickets, and more. Powered by Zendesk Interactive Voice Response (IVR) technology, the integrated phone system channels customer recognition and self-service, voicemail tickets, and more. Zendesk IVR automates common or frequently performed telephone transactions by means of a computer interacting with a person by playing prompts and responding to touch-tone or voice input. Customers are automatically prompted for information that will help the Call Center direct the customer to the appropriate agent or service to handle the ticket.

[Zendesk-AD-repeates-timeinstate.png](#)

## Zendesk Softphone

Accessible from the **Dial** tab of the Active Communications List, the built-in softphone comprises a dialpad with numeric digits and a text entry field for typing in phone numbers manually. Details about each call (i.e., caller ID, call duration, phone number, connectivity status) are displayed and updated in real time.

### Using the Dialpad

On the dialpad, you will see the following icons, each of which allow you to perform a different action.

Type in the phone number.

Select the service.

Place the call.

Place a blind call (keep your caller ID hidden).

Switch to chat.

Mark the caller as a favorite.

Record the call.

Flag the call for later use.

Pause the call (put on hold).

Enable or mute your microphone.

Hang up the phone (end the call).

Click to call.

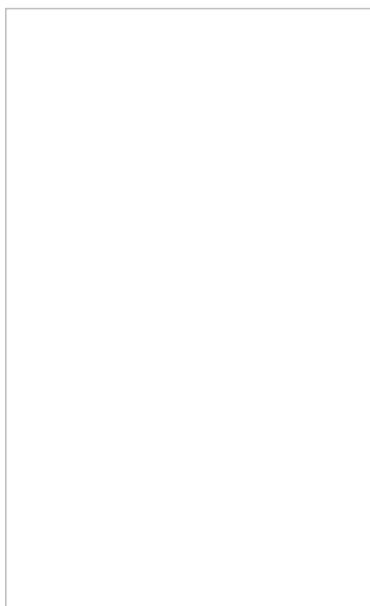
Click to chat.

## Click-to-Call

Click-to-Call is an important function that allows you to initiate calls to people who originated or handled a Zendesk ticket, with a single click.

### How to Use the Click-to-Call function

- Select a Zendesk ticket assigned to someone who has a phone number configured in the system. The name of this person will appear in the **Dial** tab of the Agent Desktop with a Click-to-Call icon next to it.
- Click the Click-to-Call icon  to make a call.



When the call is answered, you should have all of the call control functions (e.g., mute, hold, transfer, release) available to you via the integrated Bright Pattern Contact Center Agent Desktop window. Note that when you transfer an interaction to another integrated desktop user, the Zendesk item that was open on your desktop at the time of transfer will be displayed for that user.

For more information, see the [Agent Guide](#).

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## Live Chat and SMS

Zendesk chat and Zendesk SMS services make it easier for customers to reach you over rich web chat, SMS, social messengers, and mobile apps. Live chat provides push routing, multiple concurrent chats on agent, Facebook Messenger, SMS and other messaging, and customer identification. Likewise, SMS lets you handle customer inquiries over SMS as chat, send reference information via SMS on a call, process post-call surveys via SMS integrated with Zendesk, and more.

Incoming messages look the same to the agent on the integrated Agent Desktop, no matter what type of service is used. Whether it is a web chat initiated from a website widget, an SMS text message launched from a mobile phone, or a message sent from a social messaging app, the incoming message is routed to the agent and displayed in a chat window. This simplicity keeps the focus on the chat itself rather than on the technology used to deploy it.

Refer to the Bright Pattern Contact Center [Agent Guide](#) to learn more about handling chat services and mobile interactions.

### Example Chat

What follows is the sequence of actions that could occur in a typical chat. In this example, a web chat service is used.

#### **Action 1: A customer initiates a chat.**

From your website, the customer clicks the chat widget to begin a conversation. If the chat service scenario is set up to request such information, the customer is prompted for details such as name, account ID, email address, and of course, the message to be sent. The customer hits **SEND** and the message is transmitted to the next available agent.

A customer initiates a chat



**Action 2: The agent accepts the chat and interacts with the customer.** Bright Pattern Contact Center software routes the chat to the next available agent, who receives an incoming chat alert. From the integrated Agent Desktop, the agent accepts or rejects the chat (in this case, the agent accepts). The chat message appears in the Chat tab of the Active Communications List (see on the right-hand side of the screen). Information about the customer interaction (i.e., the ticket) is updated in real time and displayed in the Activity History (in the center of the screen).

The following items are shown in the Chat tab:

- Agent status ("Busy")
- Customer name
- Chat duration (in real time)
- Chat service in use
- Disposition (if any)
- Website from which the message originated
- Message (with timestamp)

From the integrated Agent Desktop, the incoming chat is accepted

**Action 3: The agent's response keeps the conversation going.**

The agent responds to the customer by typing in the text entry field.

As with the classic Agent Desktop application, the Zendesk integrated Agent Desktop enables agents to

- Type messages directly in the text entry field
- Click  to include other agents in the chat
- Click  to use canned responses or automatic greetings
- Click  send files (i.e., images, audio recordings, etc.)
- Either hit **Enter** or click  to send the message



The agent types a reply in the chat window



Agents and supervisors can customize canned responses and greetings or update notifications, passwords, and other settings by clicking on the Settings icon in the Active Communications List (located in the upper right-hand corner).

[How to update settings](#)



Refer to the Bright Pattern Contact Center [Agent Guide](#) to learn more about handling chat services and mobile interactions.

## Activity History

In the integrated Zendesk environment, information about each interaction is saved, updated in real time, and shown as a running list of notes in the center of the desktop interface. The information contained in these notes is called activity history. Notes with basic data are added automatically to the activity history upon completion of any interaction activity (i.e., hanging up a call, ending a chat, setting dispositions, finishing after-call work (ACW), and so forth).

[Zendesk-activity-history.png](#)



The Zendesk ticket activity history includes interaction-processing details such as the following:

- Start time
- Contact name
- Contact number
- Duration
- Interaction direction (outbound/inbound)

- Disposition
- Access to recording/transcript
- Attached data

## Becoming Familiar with Activity History

To test the activity history function, you simply release (i.e., complete or end) the previously established call. Upon completion of the after-call work (ACW), you should be able to see a new internal note added to the ticket with basic data about the call you just finished. This data includes start time, call type, phone number, duration (talk+hold time), disposition, service, and [global interaction identifier](#). The global interaction identifier is provided as a link. Clicking this link opens the [Interaction Records Search](#) page of the Contact Center Administrator application with the global interaction identifier preset as a search condition.

[Zendesk Activity History information](#)



## Additional Interaction Data Is Linked

If the call was recorded, the activity history will also contain a link to the voice recording. When you click the voice recording link, you should receive an incoming call. Playback of the recording will begin as soon as you answer this call. Note that in order to listen to the recording you must have the privilege [Listen to recordings linked to external CRM records](#).

## Default Settings and Customization Options

By default, the activity history is written to the last open ticket (i.e., interaction). If, according to your workflow, you need the activity history to be written to tickets that open when interactions are delivered to agents, perform the following steps:

- In the Zendesk application, navigate to *Admin > APPS > Manage > BP Support > App Configuration*
- Select the *First open ticket* option for property *Activity History*.

## Writing Activity History to Specific Zendesk Tickets

Starting with Bright Pattern Contact Center version 13.3, you can choose whether to write activity history to the Zendesk ticket that was popped to the agent only, rather than to the ticket in focus. In addition, you can select whether the activity history should be written to the first ticket open or to the last ticket open when the interaction is completed. The ability to write activity history notes to specific tickets is a useful feature for agents who receive multiple calls and chats simultaneously.

In the following example, let's walk through the process of viewing activity history and writing notes to it for certain tickets.

### **Step 1: Become familiar with the integrated desktop.**

An agent working in Zendesk will have an integrated desktop such as the one shown, where the activity history is displayed in the middle of the interface. Each open ticket appears in its own tab at the top of the screen. In order to write a note to a specific ticket, you must make sure you first click on the tab the corresponds to the desired ticket.

[The integrated Zendesk desktop](#)



### **Step 2: Accept or reject the ticket popped to the agent.**

When a call or chat is initiated by a customer or other user, a new ticket is popped to the agent. Notice that the ticket pop-up window looks the same as the alerts that pop up in the Agent Desktop. The agent can either accept or reject the call.

A ticket is popped to the agent

**Step 3: Add relevant, helpful notes to the expand the basic data given for the ticket.**

If the agent accepts the call, the activity history in the middle of the screen is updated with data regarding the current Inbound Call. The agent is able to write a note to the ticket in focus (i.e., the current inbound call's activity history) by clicking and typing into the box highlighted in green. The agent can write either a **Public reply** or an **Internal note**.

The agent can write a note for the ticket in focus

**Step 4: Complete the call, set a disposition, and add more notes if needed.**

The note is saved, and the activity history is refreshed in real-time with the new note. It appears at the top of the activity history feed in the middle of the screen. When the interaction is complete, the agent enters the after-call work (ACW) state and is able to set the disposition for the call. This is done from the dialpad pull-down menu on the right. The agent completes the ACW tasks, and the activity feed is refreshed.

The activity history is refreshed with the note for the ticket in focus



**Step 5: View all notes and data for the ticket in the activity history.**

In the following image shown, a different user or agent has written a note to the same ticket. This added note includes a link to the recorded conversation, and the note is appended to the existing note for the ticket. You can see all notes for the ticket in the activity history feed. The most recent note appears on top.

A new note is written to the ticket during ACW



You can select any note in the activity history and/or select any ticket tab (at the top of the screen), and update it with more information.

## Handling Multiple Interactions


The following rules apply to ticket-interaction association and activity history recording when agents handle multiple interactions simultaneously:

- Each active interaction in the Active Communications List (ACL) on the Agent Desktop tracks its own "last active" ticket independently of other interactions.
- When an agent accepts a new interaction:
  - If there is a screen-pop, the displayed ticket is considered the initial "last active" ticket.
  - If there is no screen-pop, no "last active" ticket will be assigned to the accepted interaction even if there was an active ticket open on the screen when the interaction was accepted.
- If the agent navigates to another ticket (opens a new ticket or explicitly navigates to a nonactive tab) while an interaction is selected in the ACL, that other ticket becomes the current "last active" ticket for that selected interaction.
- When the interaction is closed, the activity history record is attached to the current "last active" ticket of that specific interaction.
- Whenever the agent switches between interactions in the ACL, the "last active" ticket associated with the selected interaction is automatically displayed in the active Zendesk tab.
- When a new chat is offered to an agent who already has other active interactions on the desktop, the alert window will have three buttons: **Accept**, **Open**, and **Reject**.
  - The **Open** button accepts the new chat, produces the screen-pop, and makes the new chat active (i.e., it opens chat dialog and selects this chat in the ACL).
  - The **Accept** button only accepts the new chat; it does not produce a screen-pop or change the currently active interaction in the ACL.

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## Call Center Supervisor

Call Center Supervisor functionality lets a user with supervisor privileges perform typical contact center supervisor functions, such as real-time monitoring of key contact center performance indicators, helping agents with call handling, supervising agent activity, managing campaign tasks in real time, and more. These supervisor functions are essentially the same as those available to supervisors not working in Zendesk. For more information on supervising from the Agent Desktop application, see the [Supervisor Guide](#).

To test Bright Pattern Contact Center's Call Center Supervisor functionality, click the Call Center icon  in the main menu of the Zendesk desktop, on the left. The Bright Pattern Contact Center Agent Desktop should now occupy the entire Zendesk working area.

This full-screen Agent Desktop mode is normally used by supervisors only. To be able to use the supervisor functionality, you must have the [privilege Access full Agent Desktop](#). Important: To enable integrated desktop for other users of your system, make sure they all have the [privilege Use Zendesk](#).

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# Using Zendesk Integration Scenario Blocks

In Bright Pattern Contact Center software, scenarios are used to map out the sequence of actions that may occur during an interaction (voice, chat, SMS, etc.), with all the possible options, exits, prompts, and so forth, that could be presented to a user or customer.

Scenarios are built and defined in the Scenario Builder application, which is launched from the Bright Pattern Contact Center Administrator application. You can create your own scenario from scratch, or you can use a template scenario template and then customize it to suit your needs. Scenarios are constructed using "blocks," which you can learn about in more detail in the [Scenario Builder Reference Guide](#).

## Objective

The objective of this section is to examine Zendesk integration scenario blocks that look up a customer's Zendesk data, recognize the customer, and screen-pop it to an agent.

As a reminder, in order for your Zendesk scenario to work, you must complete all the integration and configuration steps as noted in this guide. These instructions are available in the following articles.

- [Prerequisites](#)
- [Zendesk Integration Setup](#)
- [Single Sign-On Setup](#)
- [Screen-Pop Configuration](#)
- [Accessing Zendesk Data from Scenarios](#)

## Zendesk Scenario Blocks Overview

The following Zendesk blocks are available in the Scenario Builder application:

- [Zendesk API Request](#), which allows you to submit a free-form Zendesk API request to Zendesk using JSON.
- [Zendesk Search](#), which allows you to obtain data from your Zendesk account
- [Zendesk Create Object](#), which allows you to create new tickets and users in Zendesk
- [Zendesk Update Object](#), which allows you to update existing Zendesk tickets and users
- [Zendesk Screen Pop](#), which allows you to synchronize the delivery of calls and related Zendesk records to the agents
- [Attached Data](#), which allows you to populate custom fields in Zendesk activity history; note that this block may be used with other CRM integrations

## Zendesk Scenario Building Notes

When building your Zendesk scenario, note the following:

- The Zendesk scenario blocks function the same whether they are used in voice or chat scenarios.
- Zendesk scenario blocks work best when configured with other Zendesk scenario blocks, either in pairs or in a series. For example, if you want to search your Zendesk account for a customer's contact information, then pop the contact information search results to the agent, your scenario would need both the *Zendesk Search* block and the *Zendesk Screen Pop* block.
- Using the *Zendesk Create Object* block, you can make the scenario pop a new ticket every time the customer calls/chats, but you don't have to do it that way. It may be enough to search for and pop the customer's contact info so you don't have so many tickets.

## Zendesk Scenario Examples



As with any scenario, Zendesk scenarios can be as simple or as elaborate as you would like them to be. For a better understanding of how Zendesk scenario blocks work within both voice and chat scenarios, Bright Pattern has simple Zendesk scenario examples available for you to study and download.

- [Example Voice Scenario: Search for and Pop Zendesk Ticket](#)
- [Example Chat Scenario: Search for and Pop Zendesk User](#)

## Example Voice Scenario: Search for and Pop a Zendesk Ticket

Click the following link to download a version of this Zendesk voice scenario example.

[File:App Zendesk Search and Pop \(Voice\).zip](#)

For instructions on how to import this file into your contact center, see the *Contact Center Administrator Guide*, section [Scenarios Overview > How to Export and Import Scenarios](#).

For more information about scenarios, refer to the [Scenario Builder Reference Guide](#).

### Voice Scenario Flow

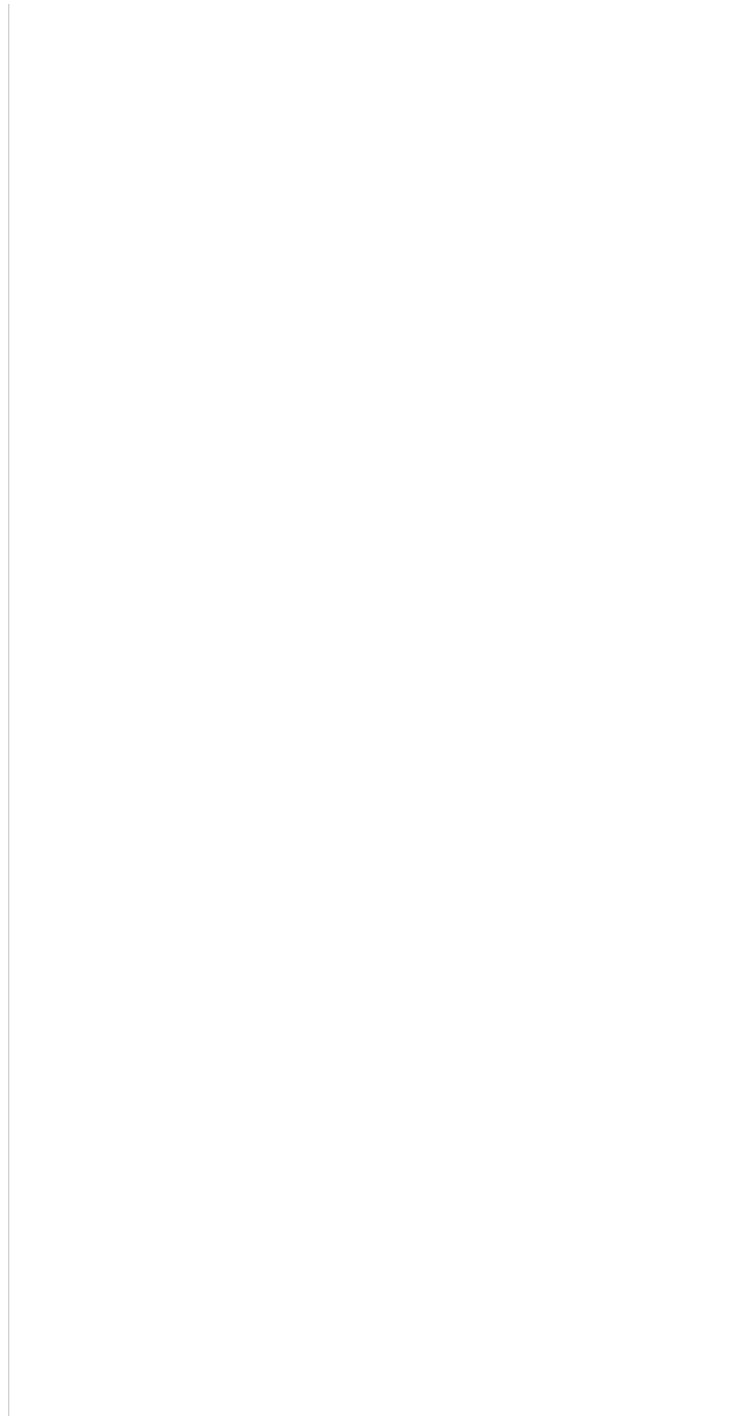
What follows is the sequence of actions that could occur in a basic Zendesk voice scenario flow. Please note this is an example scenario only and not intended for production use. All conditional exits should be defined with actions for production use.

### The Complete Voice Scenario

The diagram shown illustrates what a complete scenario looks like when designed in the Scenario Builder application.

[Zendesk-integration-guide-scenario1.PNG](#)





**Action 1: An inbound call comes in, and the customer is prompted for information.**

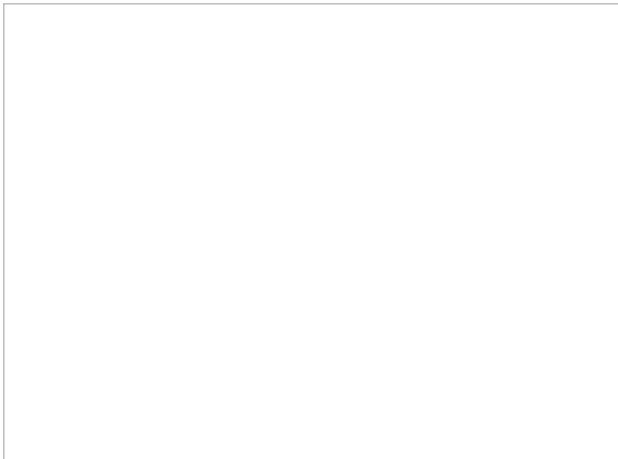


A customer calls Bright Pattern Support. (For simplicity, service hours verification is omitted, and agent skill requirements are identified by the dialed number.) The customer is greeted with a [Collect Digits](#) block with the following prompt: *Welcome to Bright Pattern support. If you are calling about an existing case and have the case number, please enter it now followed by the pound sign. Otherwise please remain on the line.*

**Action 2: The customer does not enter a case number, so the scenario identifies the customer by caller ID.**



If the customer does not enter any digits, a [Zendesk Search](#) block is used to recognize the customer by ANI (Caller ID).

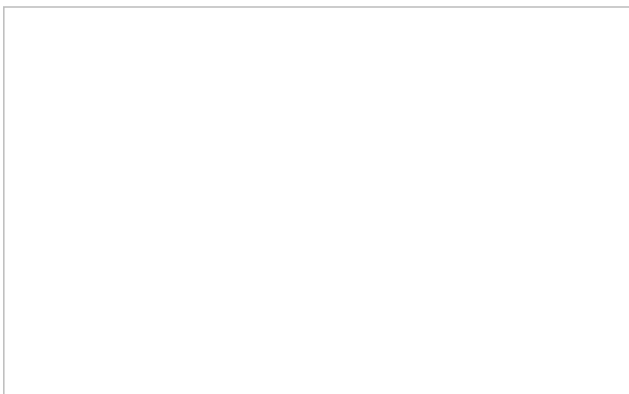


Customer identification by ANI

**Action 3: The customer's data is pulled from Zendesk data and popped to the agent.**



If the customer record is found, a [Zendesk Screen Pop](#) block is used to pop the customer record into the Zendesk application of the agent that will receive the call. The call is then sent to the service queue.



Customer record screenpop

**Action 4: The scenario looks up ticket data.**

If the ticket number is entered, a [Zendesk Search](#) block is used to look up the ticket information.

Ticket search by ticket number

#### **Action 5: The customer is directed to a menu.**

[Menu scenario block](#)

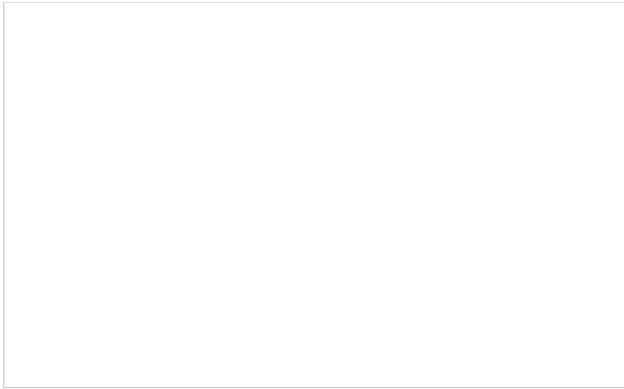
A [Menu](#) block is then used with the following prompt: *Thank you. We have found the ticket with subject  $\$(zdTicket.subject)$ . For the status of this ticket, press 1. For any other inquiries, press 2 or stay on the line.*

#### **Action 6: A prompt regarding ticket status is played to the customer.**

If the self-service is selected, a [Play Prompt](#) block is used to inform the customer about the current ticket status: *The current status of this ticket is  $\$(zdTicket.status)$ . Thank you for your inquiry. Goodbye.* The call is then marked as self-served and released.

#### **Action 7: The customer's ticket/case information is popped to the agent.**

If the customer needs the agent's help, a [Zendesk Screen Pop](#) block is used to pop the ticket to the Zendesk application of the agent who will receive the call. The call is then sent to the service queue.



Ticket screenpop

## Example Chat Scenario: Search for and Pop a Zendesk User

Click the following link to download an annotated version of this Zendesk chat scenario example.

[File:App Zendesk Search and Pop User \(Chat\).zip](#)

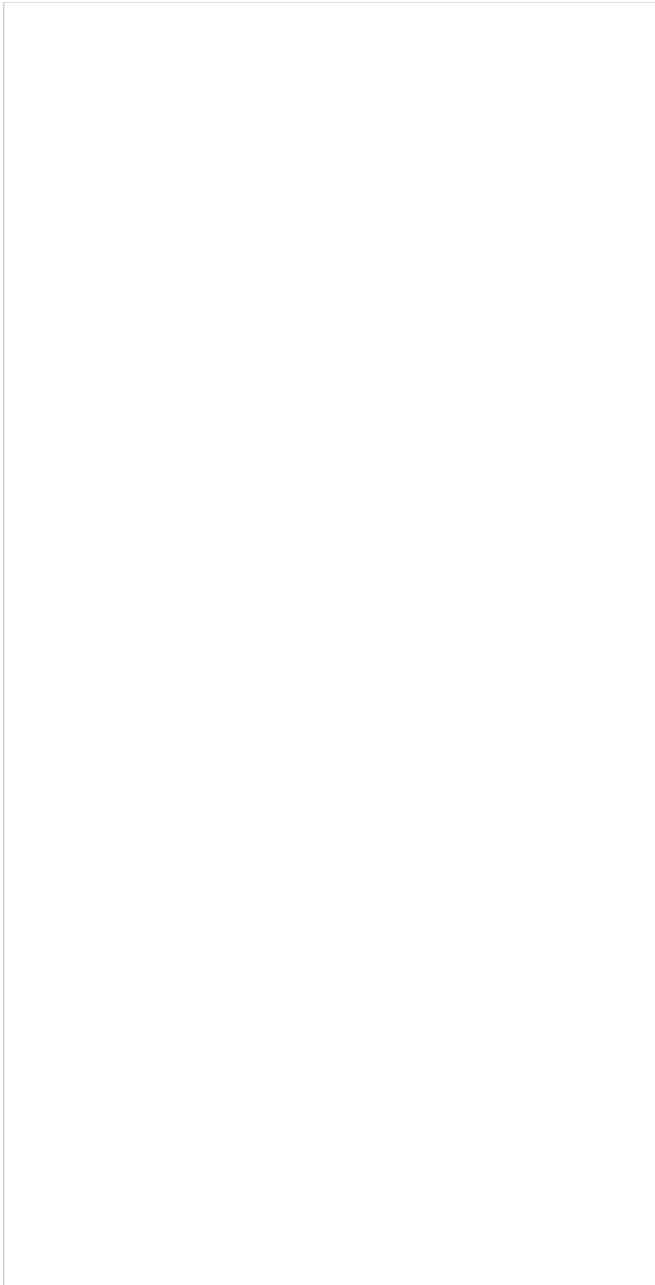
For instructions on how to import this file into your contact center, see the *Contact Center Administrator Guide*, section [Scenarios Overview > How to Export and Import Scenarios](#).

For more information about scenarios, refer to the [Scenario Builder Reference Guide](#).

### Chat Scenario Flow

What follows is the sequence of actions that could occur in a basic Zendesk chat scenario flow. Please note this is an example scenario only and not intended for production use. All conditional exits should be defined with actions for production use.

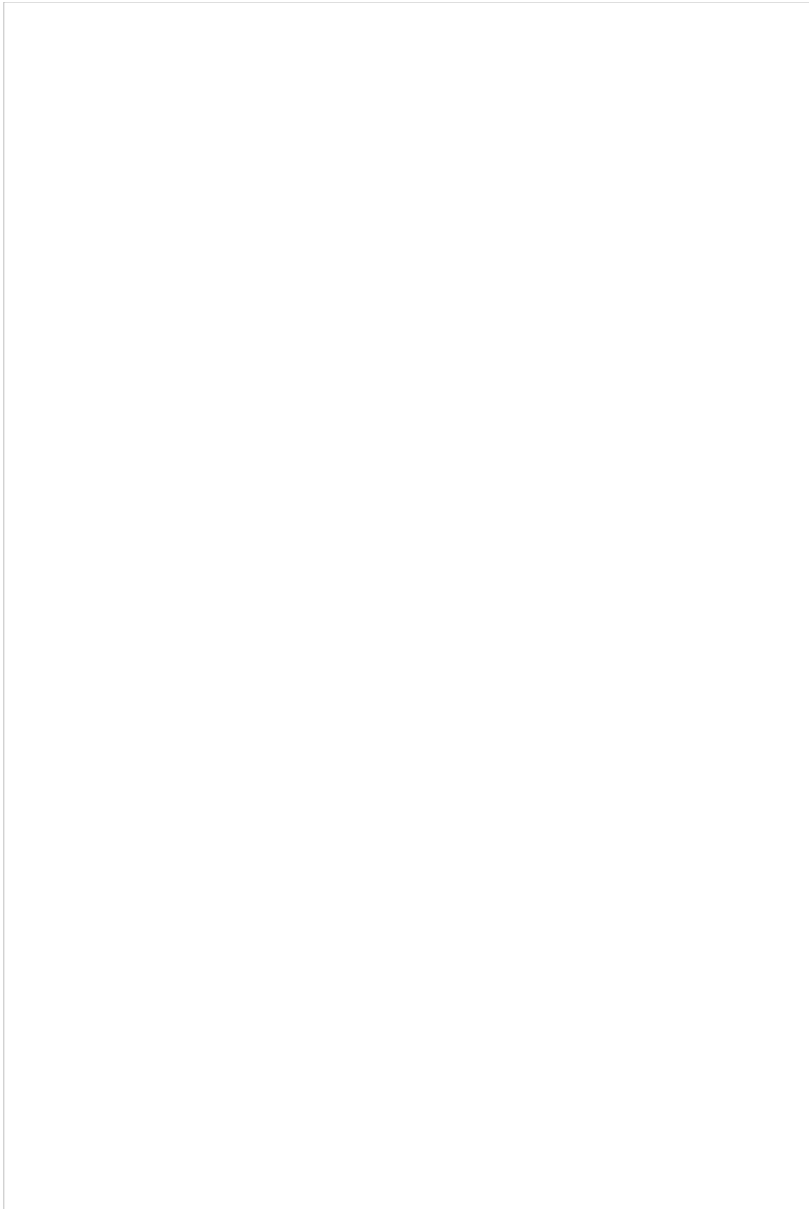
Because this scenario works with a chat widget, you will need to configure all chat related settings in order for this scenario to work (e.g., [a chat service](#), [a Messaging/Chat scenario entry](#), [a contact tab](#), [a pre-chat form](#), [the HTML snippet](#), etc.). For more information, see the *Contact Center Administrator Guide*, section [How to Configuration Web Chat](#).



The pre-chat form used in this scenario, as seen by the customer

## **The Complete Chat Scenario**

The diagram shown illustrates what a complete scenario looks like when designed in the Scenario Builder application.



Example Zendesk chat scenario overview

**Action 1 (Optional): A customer fills out a pre-chat form with their first name, last name, email address, and a brief message; the brief message should go to the agent.**

If block

Set Variable block

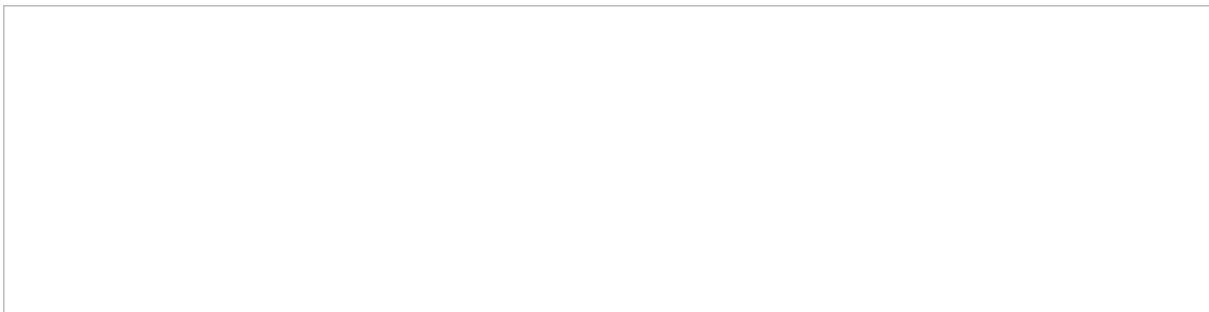
Using an [If](#) block, the scenario searches the pre-chat form to see if the message field is empty or not. Then, if the field is not empty, the [Set Variable](#) block is told to treat what was entered in the field as a chat message; this is done by resetting the value to [item.newMessage](#).

The variable *item.newMessage* adds a new message as it was received from the customer from chat interactions. This variable is used to populate a chat session with form field values. The new message is treated as it was received from the customer and is added to chat transcript.



If block configuration

While it is not necessary to include a message field on a [pre-chat form](#), you may find it useful for your agents, as well as for reporting purposes. For more information, see the *Scenario Builder Reference Guide*, section [Variables](#).



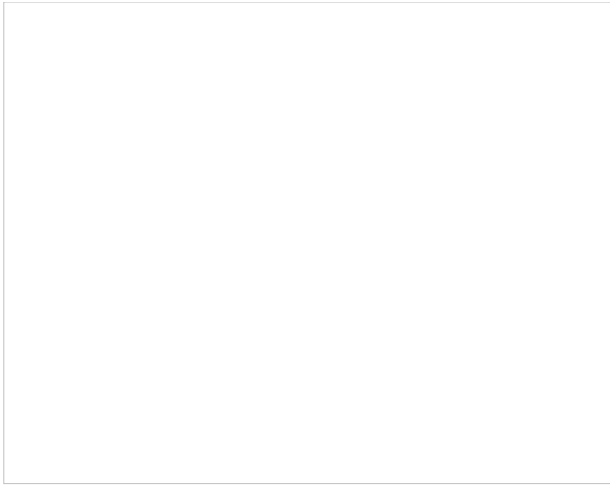
Set Variable block configuration containing *item.newMessage*

## Action 2: The scenario searches for matching customer information in Zendesk.

[Zendesk Search block](#)

Next, using a [Zendesk Search](#) block, the scenario searches in your Zendesk account for customer information entered on the pre-chat form. In this instance, the block will search in Zendesk for a customer whose email address matches the one entered in the pre-chat form's email field; the results are returned to the variable entered in the *Recordset name* field.



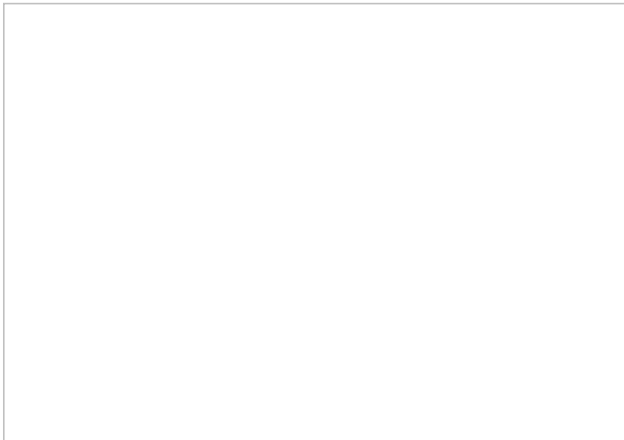


Zendesk Search block configuration

**Action 3: The customer information from the Zendesk search is configured to pop to the agent.**

[Zendesk Screen Pop block](#)

If the search for a matching customer email address is successful, you will want the search results to pop on the agent's screen. This is done with the [Zendesk Screen Pop](#) block. In this example, the variable from the *Recordset name* field in the *Zendesk Search* block is used to pop the ID of the user (i.e., customer) to the agent. Note that if you want this information to pop, check the box **Pop screen upon answer**.



Zendesk Screen Pop block configuration

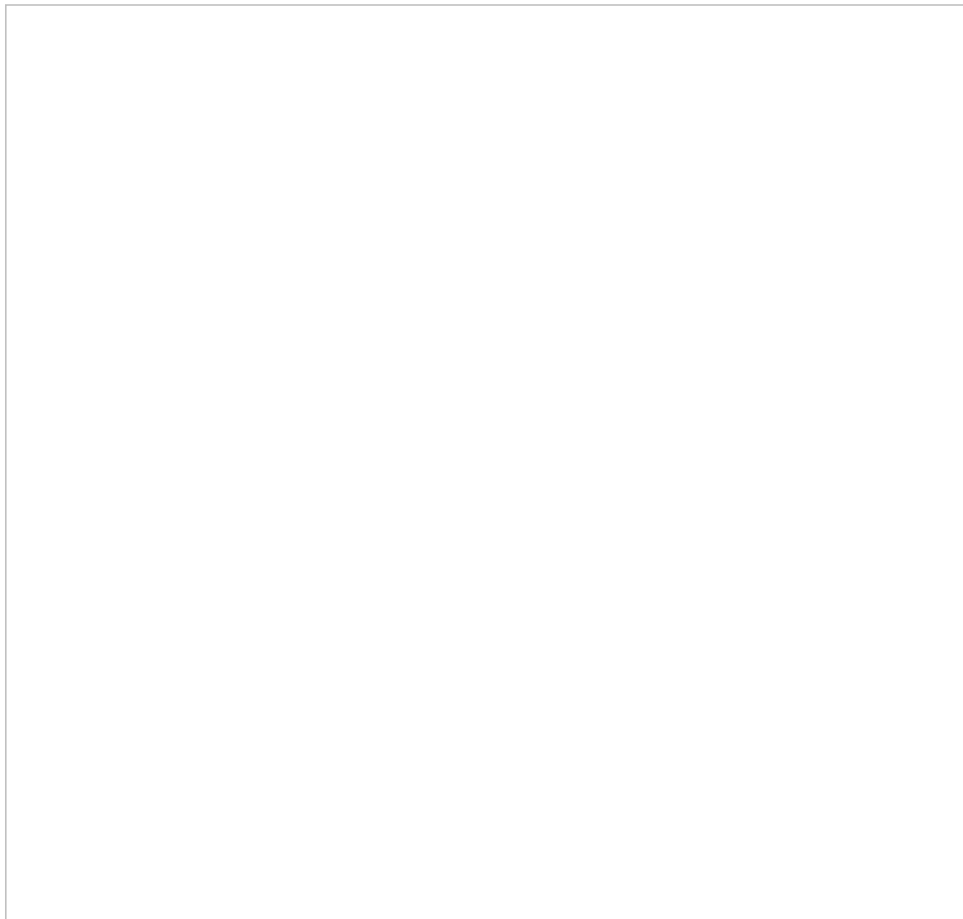
**Action 4: The scenario finds an agent available to take the chat and pop the Zendesk search information to.**

[Find Agent \(Chat\) block](#)

Next, the scenario searches for an available agent to receive the chat and the *Zendesk Search*; it does this by using the [Find Agent](#) block. You can use *Find Agent* to set wait times and send the customer messages about [estimated waiting time \(EWT\)](#).

In this example, there is a [wait condition](#) configured to send any agent with a minimum skill set the chat. Additionally, both the *Initial message* field and the *Periodic message* field are configured to send messages with the [item.EWT](#) variable; this variable will display the EWT in seconds it will be before the customer is connected with an agent.

When configuring your scenario, please consult the *Scenario Builder Reference Guide* for full detail about the *Find Agent* block. As a reminder, all conditional exits should have a defined action to ensure the integrity of your scenario.



Find Agent block configuration

### **Action 5: The agent is connected to the chat with the customer.**

[Connect Chat block](#)

After finding an available agent, the scenario uses the [Connect Chat](#) block to connect the agent to the customer. It is at this time that the information from the *Zendesk Search* block is popped to the agent. Note that in this example no additional settings are configured.

As a general reminder, the *Find Agent* block and *Connect Chat* block (or *Connect Call* block, if in a voice scenario) are meant to work together. That is, these blocks should be arranged in a scenario with no other blocks between them.



Connect Chat block configuration

The following image is what the agent sees in Zendesk when the chat is connected and the screen pops with the customer's information.



The agent's view of Zendesk with the chat message from the pre-chat form and the popped search results

### **Action 6: The scenario ends.**

[Exit block](#)

Finally, when either the agent or the customer ends the chat, the scenario will end; this is defined by using the [Exit](#) block. Bright Pattern generally recommends to always terminate a scenario or scenario branch that should not continue with an *Exit* and not rely on the customer to do so. That is, it is good practice to end scenarios and conditional exists because you always want to know what your scenario will do in any given situation. An *Exit* block will forcibly terminate the scenario wherever it is used.

