



Zendesk Screen Pop Connector

Printed Help

PureConnect powered by Customer Interaction Center® (CIC)

2018 R1

Last updated October 31, 2017

Abstract

This document is a printable version of the Zendesk Screen Pop Connector Help.

Table of Contents

Zendesk Screen Pop Connector	4
About the Zendesk Screen Pop Connector	4
Overview	4
Get started	4
Troubleshoot.....	4
Release Notes	4
About the Zendesk Screen Pop Connector	4
Overview	4
Get started	5
Troubleshoot.....	5
Release Notes	5
How the Zendesk Screen Pop Connector works with Zendesk.....	5
Concepts for the Zendesk Screen Pop Connector	6
Connector Group	6
Connector instance	7
Custom fields in Zendesk	8
Zendesk screen pop actions.....	10
Workflow for the Zendesk Screen Pop Connector	10
Networking components of the Zendesk Screen Pop Connector for CIC.....	12
Requirements for the Zendesk Screen Pop Connector.....	12
Access a purchased connector.....	13
Set up the Zendesk Screen Pop Connector.....	13
Tasks to complete in PureCloud	13
Tasks to complete in CIC.....	14
Install the bridge server	14
Add a Zendesk Screen Pop Connector	16
Configure the Zendesk Screen Pop Connector	18
Access the Connector Details page.....	18
Add Configuration values.....	18
Add CIC credentials	19

Add Zendesk credentials.....	19
Add a connector instance	19
Configure screen pop actions for the Zendesk Screen Pop Connector	20
Configure the Zendesk Open Contact screen pop action	20
Configure the Zendesk Open Contact By ANI screen pop action	21
Configure the Zendesk Open Ticket screen pop action	22
Configure the Zendesk Open Ticket By ANI screen pop action	23
Configure Interaction Attendant for the Zendesk Screen Pop Connector	25
Configure user email addresses for the Zendesk Screen Pop Connector	27
Troubleshoot the Zendesk Screen Pop Connector	28
Connector log files	28
Server log files.....	28
CIC server switchover.....	29
Connector failed to start.....	29
No screen pop occurs.....	30
Unable to connect to the Zendesk server.....	31
Copyright and Trademark Information	32
Release notes for the Zendesk Screen Pop Connector	34
2018 R1	34
zendeskscreenpop-CIC2015r2	34

Zendesk Screen Pop Connector

About the Zendesk Screen Pop Connector

Overview

The Zendesk Screen Pop Connector integrates Zendesk with CIC (Customer Interaction Center). The connector allows the creation of screen pops based on caller information.

- [How the connector works with Zendesk](#)
- [Concepts](#)
- [Workflow](#)
- [Networking components](#)

Get started

To use the Zendesk Screen Pop Connector, access the purchased connector and then set up and configure items for PureCloud Bridge and CIC.

- [Requirements](#)
- [Access a purchased connector](#) (logon required)
- [Set up the Zendesk Screen Pop Connector](#)

Troubleshoot

For any problems with the Zendesk Screen Pop Connector, browse troubleshooting information about log files and individual issues.

- [Troubleshoot the connector](#)

Release Notes

- [Release Notes](#)

About the Zendesk Screen Pop Connector

Overview

The Zendesk Screen Pop Connector integrates Zendesk with CIC (Customer Interaction Center). The connector allows the creation of screen pops based on caller information.

- [How the connector works with Zendesk](#)
- [Concepts](#)

- [Workflow](#)
- [Networking components](#)

Get started

To use the Zendesk Screen Pop Connector, access the purchased connector and then set up and configure items for PureCloud Bridge and CIC.

- [Requirements](#)
- [Access a purchased connector](#) (logon required)
- [Set up the Zendesk Screen Pop Connector](#)

Troubleshoot

For any problems with the Zendesk Screen Pop Connector, browse troubleshooting information about log files and individual issues.

- [Troubleshoot the connector](#)

Release Notes

- [Release Notes](#)

How the Zendesk Screen Pop Connector works with Zendesk

The Zendesk Screen Pop Connector pops user or ticket records in Zendesk based on four different types of actions. After configuring these actions in Interaction Administrator, they appear as options within the screen pop operation of Interaction Attendant.

Zendesk Open Contact—creates a screen pop for a user in Zendesk based on the user's ID.

Zendesk Open Contact By ANI—creates a screen pop for a user in Zendesk based on the interaction's ANI (the number from which the caller is calling).

Zendesk Open Ticket—creates a screen pop for a ticket in Zendesk based on the ticket's ID.

Zendesk Open Ticket By ANI—creates a screen pop for the most recent ticket in Zendesk based on the interaction's ANI (the number from which the caller is calling). The connector only adds this custom data to new tickets, not existing tickets. This option can be configured to:

- Pop a new ticket rather than the most recent ticket (always or only when an existing ticket isn't found).
- Populate the new ticket with custom data by setting a single custom field in Zendesk.

These screen pop actions provide the connector with the data necessary to perform a screen pop within Zendesk. After you set the input parameters in Interaction Attendant, these actions then set the necessary interaction attributes on the call for the connector to activate a screen pop. To minimize API calls to Zendesk, the connector retrieves certain information from Zendesk and caches it on the bridge server.

Tip: Entries added or updated in Zendesk may not be available for use by the connector for up to 10 minutes.

Concepts for the Zendesk Screen Pop Connector

The following sections explain key concepts for the Zendesk Screen Pop Connector.

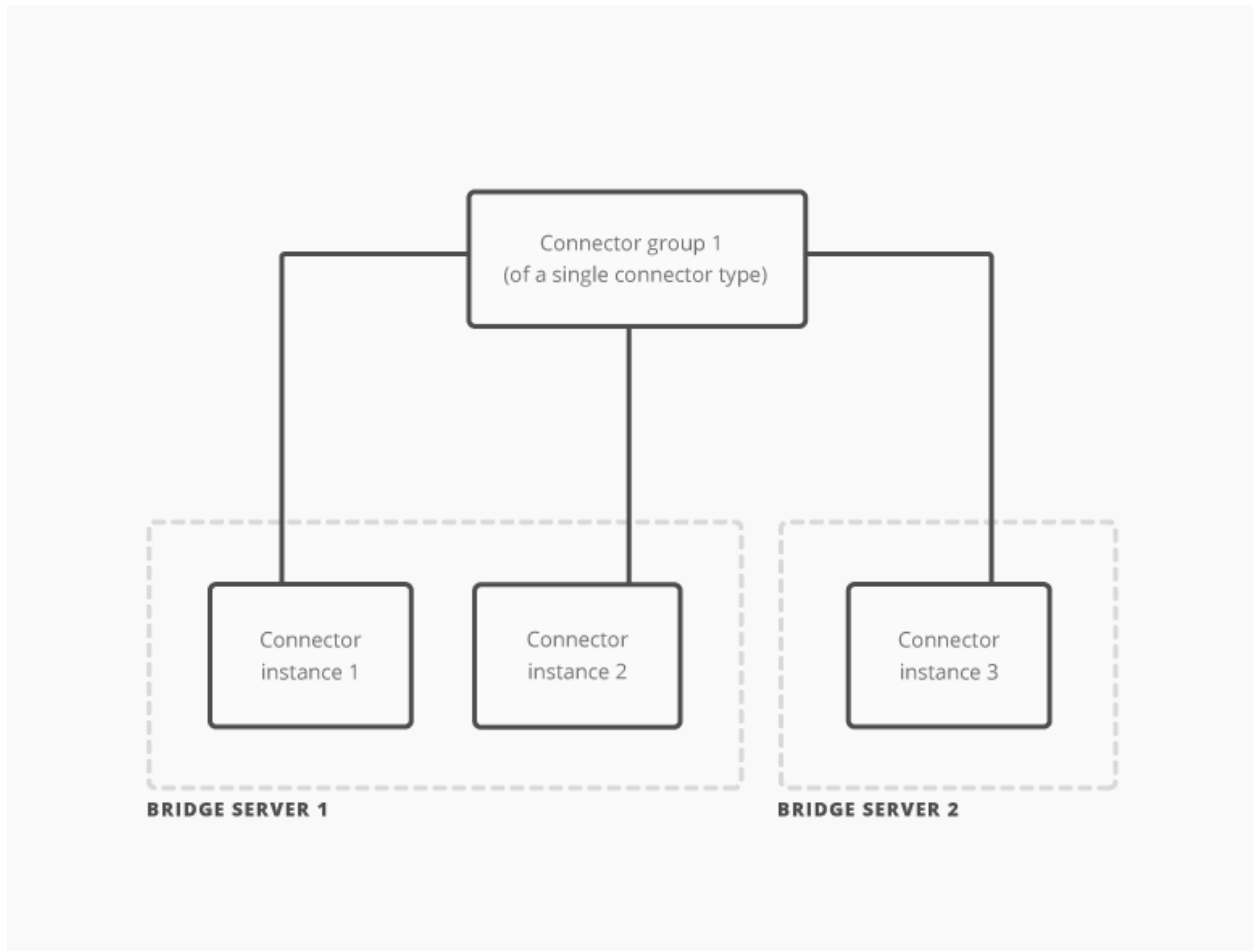
- [Connector group](#)
- [Connector instance](#)
- [Custom fields in Zendesk](#)
- [Zendesk screen pop actions](#)

Connector Group

A **connector group** refers to a single configuration of a connector type that is set up and configured in PureCloud. For example, the connector group `WebServicesDataDip` refers to a single configuration of the connector type `webservices-datadip`.

For different configurations, use multiple connector groups of the same connector type. The connector groups can use the same bridge server or different Bridge Servers.

Connector groups must include a single instance of a connector, but can include multiple instances of a connector for resiliency purposes (if the connector supports failover and fault tolerance).



Connector groups, connector instances, and bridge servers

Connector instance

A connector instance refers to a single occurrence of a connector in a connector group. Each connector group must have at least one connector instance.

All instances in a connector group share the same configuration and are of the same connector type. For example, all instances in the connector group `WebServicesDataDip` share the same configuration and are of the connector type `webservices-datadip`.

Use multiple instances in a connector group for:

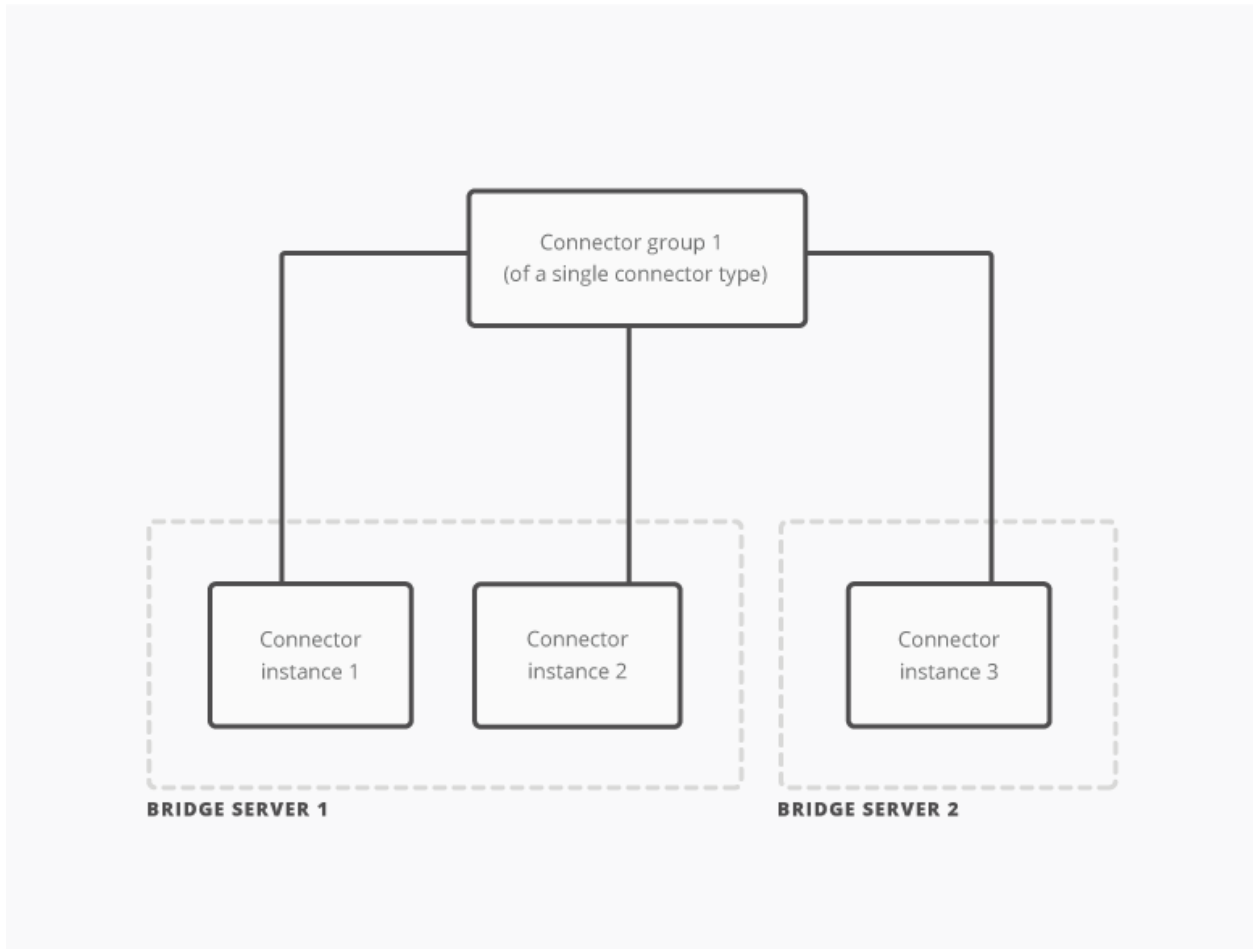
- connector failover support*

To do this, run multiple instances with the same bridge server or different Bridge Servers.

- Bridge server fault tolerance*

To do this, run multiple instances with different Bridge Servers.

* If supported by the connector



Connector groups, connector instances, and bridge servers

Custom fields in Zendesk

Fields in Zendesk can be divided into two types:

System

These fields appear by default in Zendesk User, Organization, and Ticket records. They can be common to all record types or common across a single record type. For example, all User, Organization, and Ticket records contain the Tags field, but only Ticket records contain the Priority field.

Custom

These fields are field types that you can add to User, Organization, or Ticket records and name with your own titles. For example, you can add a text field type to all User records and call it CIC Agent Id.

The screenshot shows a user profile for John Smith. The profile is divided into several sections:

- Header:** John Smith (with a close button 'x' and an '+ add' button).
- Test:** John Smith (with a 'Test' button).
- Role:** Light Agent
- Groups:** Support
- Alias:** -
- Signature:** -
- Primary email:** john.smith@test.com (with a dropdown arrow and a warning icon). Below it is a '+ add contact' button.
- System Fields (highlighted with a red border):**
 - Tags: -
 - Org.: Test
 - Language: English
 - Time zone: (GMT-04:00) Eastern Time (...)
 - Details: -
 - Notes: -
- Custom Fields (highlighted with a red border):**
 - CIC Agent Id: [Text input field]
 - PureCloud Username: [Text input field]
 - a new item: [Text input field]

Tip: Only custom fields can be used with the Zendesk Open Ticket By ANI action.

Zendesk screen pop actions

The Zendesk Screen Pop Connector pops user or ticket records in Zendesk based on four different types of actions. After configuring these actions in Interaction Administrator, they appear as options within the screen pop operation of Interaction Attendant.

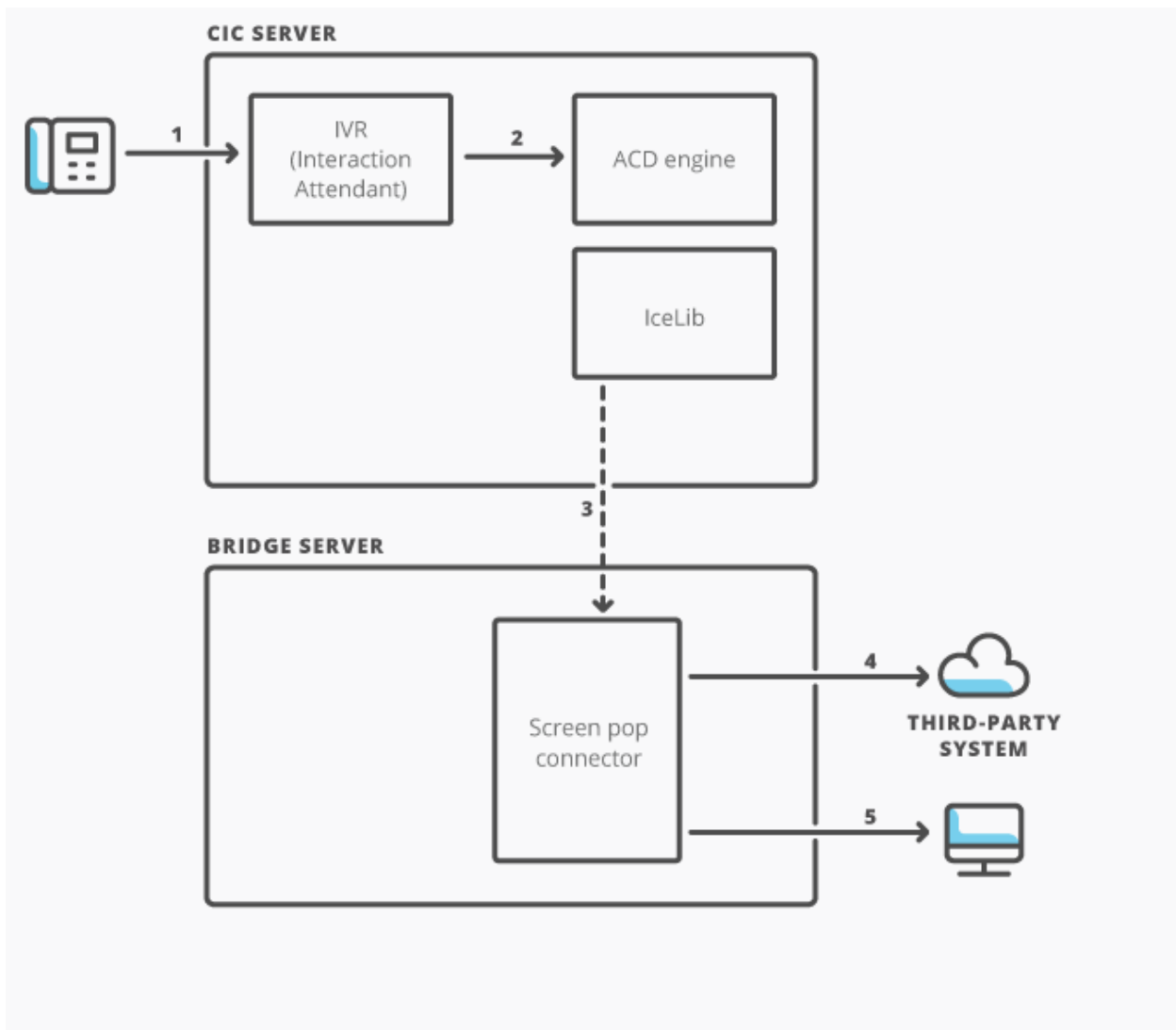
- Zendesk Open Contact: creates a screen pop for a user in Zendesk based on the user's ID.
- Zendesk Open Contact By ANI: creates a screen pop for a user in Zendesk based on the interaction's ANI (the number from which the caller is calling).
- Zendesk Open Ticket: creates a screen pop for a ticket in Zendesk based on the ticket's ID.
- Zendesk Open Ticket By ANI: creates a screen pop for the most recent ticket in Zendesk based on the interaction's ANI (the number from which the caller is calling). Zendesk Open Ticket By ANI can be configured to:
 - Pop a new ticket rather than the most recent ticket (always or only when an existing ticket isn't found).
 - Populate the new ticket with custom data by setting a single custom field in Zendesk.

Note: The connector only adds this custom data to new tickets, not existing tickets.

These screen pop actions provide the connector with the data necessary to perform a screen pop within Zendesk.

Workflow for the Zendesk Screen Pop Connector

The following is a common workflow using a screen pop by ANI action with the screen pop connector.

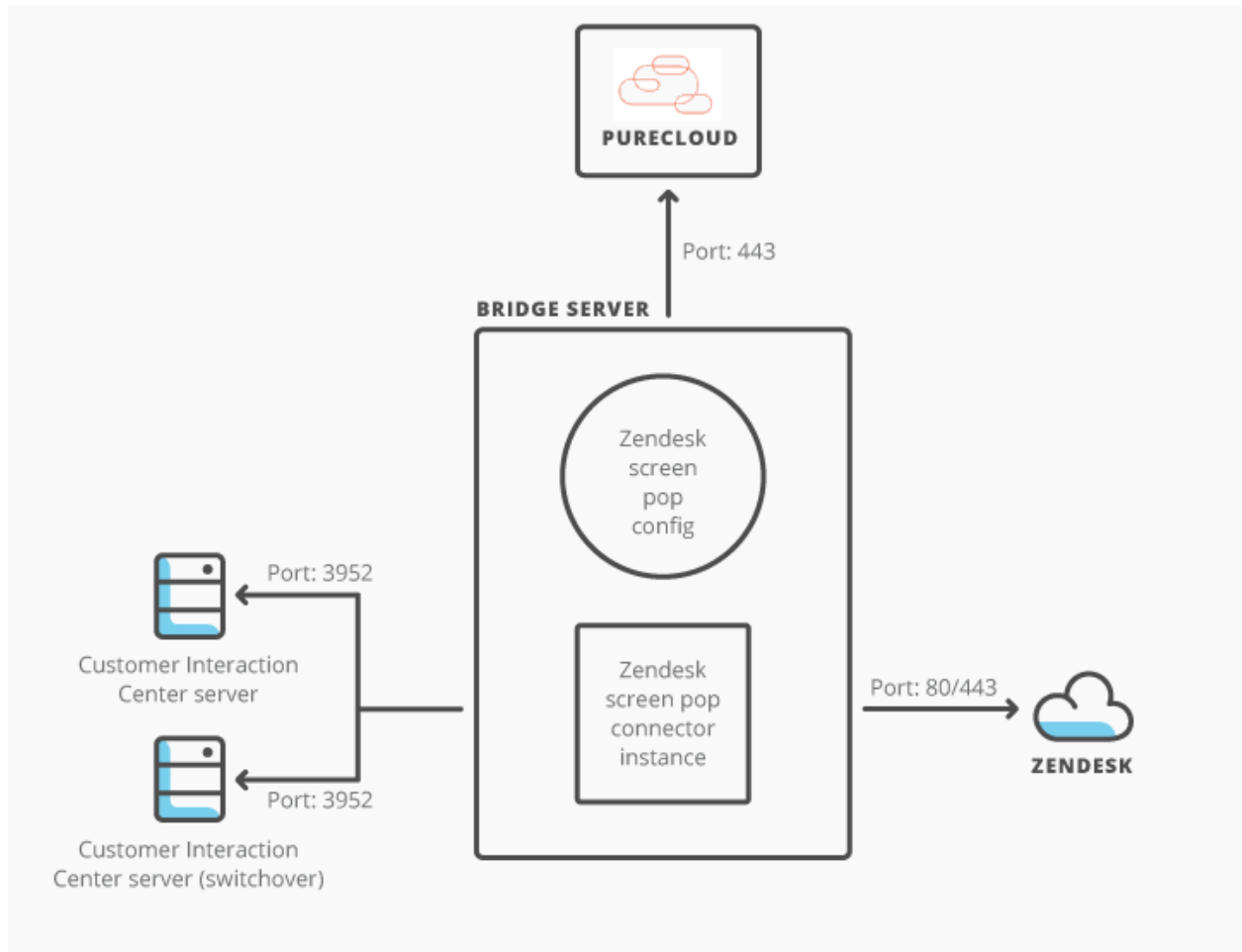


Workflow for the Zendesk Screen Pop Connector

1. A phone call comes into the IVR. Based on the ANI of the call, the IVR sets an interaction attribute within the screen pop step.
2. The IVR transfers the interaction to a workgroup queue. The ACD engine then assigns the interaction to an agent.
3. The connector uses IceLib to monitor agents in the workgroup for interactions with this screen pop attribute and to watch these interactions.
4. When a watched interaction begins alerting or goes connected, the connector uses the ANI value that was added in the IVR to perform a data dip into the third-party system. The connector retrieves the contact or ticket ID from the third-party system.
5. The connector then performs a screen pop in an agent's browser that shows the record with that ID from the third-party system.

Networking components of the Zendesk Screen Pop Connector for CIC

The following diagram shows which ports are needed for outbound access from the bridge server and the connector to PureCloud, CIC, and Zendesk.



Networking components of the Zendesk Screen Pop Connector

Requirements for the Zendesk Screen Pop Connector

Prerequisite: Before setup, purchase the connector and then follow the [steps to access it](#) (login required).

PureCloud Bridge

- a PureCloud organization with a bridge server
- an instance of the connector configured for that bridge server
- a running Customer Interaction Center (CIC) server

- logon credentials set in the connector configuration
- all non-optional fields filled out in the connector configuration

Note: The year and release in the connector name indicates the minimum supported version of the CIC server. For example, a connector with 2015 R2 in the name requires a CIC server that is 2015 R2 or newer.

CIC

- a running Customer Interaction Center (CIC) server
- an IVR, such as Interaction Attendant, that can set call attributes on an interaction
- user email addresses configured within Interaction Administrator that match email addresses used for Zendesk logons

Zendesk

- Zendesk with proper security permissions
- Zendesk agents with a role in Zendesk that allows them to view tickets

Note: For a screen pop to occur, an agent must have a browser open and be logged on to Zendesk.

Access a purchased connector

To use the Zendesk Screen Pop Connector:

1. Using a web browser, login to open the bridge server page at <https://my.inin.com/products/Bridge/pages/default.aspx>.
2. Proceed to [Set up and configure items for PureCloud Bridge and CIC](#).

Set up the Zendesk Screen Pop Connector

To setup the connector, perform these high-level tasks in PureCloud and CIC.

Tasks to complete in PureCloud

Complete the tasks below to configure PureCloud settings for the connector. Each link opens a procedure on the PureCloud Resource Center. When you finish a task, use your browser's back button to return to this topic. Then proceed to the next task.

1. [Install the PureCloud bridge server](#).
2. [Add a Zendesk Screen Pop Connector](#).
3. [Configure the Zendesk Screen Pop Connector](#).

Tasks to complete in CIC

1. Start the Zendesk Screen Pop Connector.
2. [Configure screen pop actions.](#)
3. [Configure Interaction Attendant for the Zendesk Screen Pop Connector.](#)
4. [Configure user email addresses for the Zendesk Screen Pop Connector.](#)

Install the bridge server

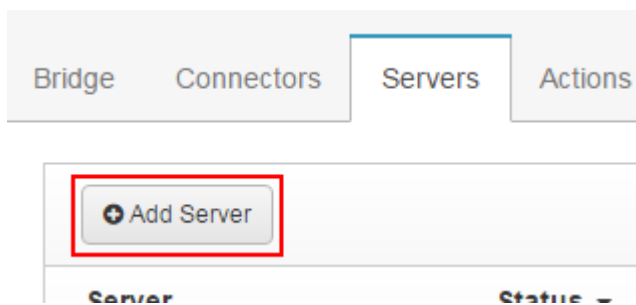
Install the bridge server so you can begin adding connectors for various data systems.

Prerequisites:

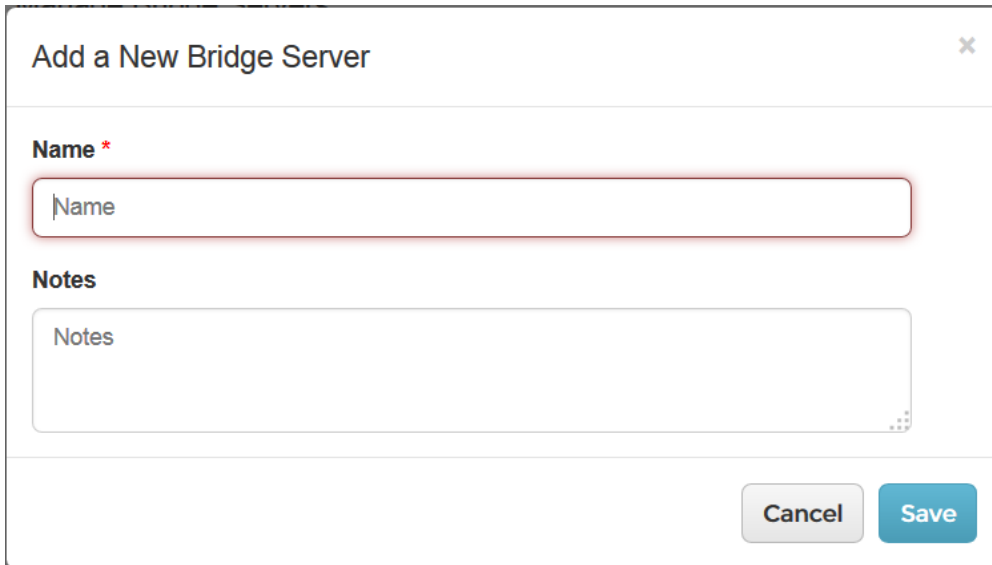
- Machine (virtual machine recommended) for running the bridge server (see [PureCloud bridge server specifications](#)).
- Plan for handling connector credentials (Active Directory, Microsoft Exchange, and SharePoint integrations only)
- Plan for fault tolerance (know how many Bridge Servers you will install)
- If you plan to configure the bridge server and connectors behind a web proxy, complete the [proxy server configuration](#) before you install the bridge server.
- Make sure to apply all critical and important Windows updates before you install the bridge server.

Procedure:

1. In PureCloud, click **Admin**.
2. Under Integrations, click **Bridge**.
3. Click the **Servers** tab, then click **Add Server**.

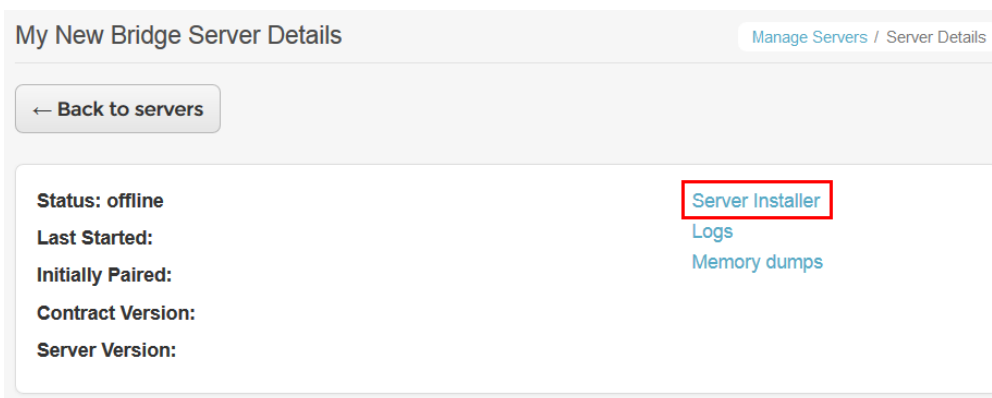


4. Enter a name and optional description, then click **Save**.



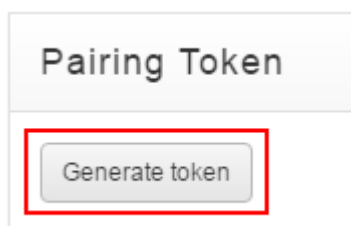
A dialog box titled "Add a New Bridge Server" with a close button (X) in the top right corner. It contains two input fields: "Name *" with a red border and a cursor, and "Notes" with a red border. At the bottom right, there are two buttons: "Cancel" and "Save".

5. Click **Server Installer** to download the bridge server executable.



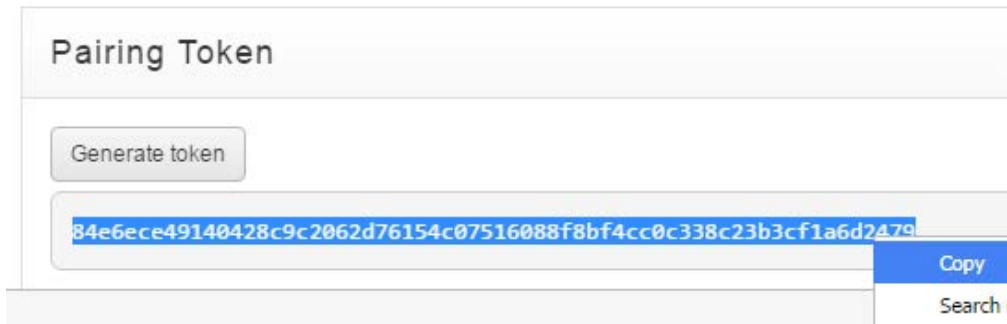
A page titled "My New Bridge Server Details" with a breadcrumb "Manage Servers / Server Details". A "← Back to servers" button is at the top left. On the left, there are labels: "Status: offline", "Last Started:", "Initially Paired:", "Contract Version:", and "Server Version:". On the right, there are links: "Server Installer" (highlighted with a red box), "Logs", and "Memory dumps".

6. Under Pairing Token, click **Generate token**.



A section titled "Pairing Token" with a "Generate token" button highlighted by a red box.

7. Copy the pairing token that appears to your Clipboard or a text file.



8. Run the bridge server executable to start the installation wizard. Follow the prompts.
 - a. Select a destination folder.
 - b. Select your Amazon Web Services region.
 - c. Paste the token into the Token field.
 - d. If you are using a [proxy server](#), type the proxy address in the Proxy Server field.
 - e. Select a service account based on your plan for handling the [Bridge credentials](#):
 - If the connectors will receive credentials from the cloud through the Network Service, accept the default.
 - If the connectors will receive credentials from the bridge server domain account, type the account credentials. Make sure that the account credentials include the domain name before the user name (domain\username).
 - f. Click **Install**.
9. If you plan to install multiple instances of the bridge server for fault tolerance, repeat the previous steps to install the bridge server on other machines.

Tip: You can [upgrade a bridge server](#) when a message on the Servers tab of the Bridge page indicates that a new version of the server is available.

Add a Zendesk Screen Pop Connector

Note: The year and release in the connector name indicates the minimum supported version of the CIC server. For example, a connector with 2015R2 in the name requires a CIC server that is 2015R2 or newer.

Prerequisite: Before setup, purchase the connector and then follow the [steps to access it](#) (login required).

To add a new connector group:

1. In PureCloud, click **Admin**.
2. Under Integrations, click **Bridge**
3. Click the **Connectors** tab.
4. Click **Add a Connector**. A pop-up window appears.

Add a new Connector
✕

Name *

Description

Choose a Connector *

All Publishers

Search

active-directory-connector

cic-connector

exchange-connector

mscrm

mssqlserverdb

oracledb

«
1
2
3
4
5
»

Publisher

Name
active-directory-connector

Latest Compatible Version
win-x86: v2.1.0.265

Save
Cancel

- a. Enter a name. The name must not contain any spaces but can include hyphens. This name appears as the Group Name on the Manage Connectors page.

Use unique names. Unique names differentiate multiple connector groups of the same connector type from one another. For example, if you create two connector groups for the Zendesk Screen Pop Connector, name them ZendeskSPGroup1 and ZendeskSPGroup2.

You can use multiple connector groups of the same connector type but with different configurations for different parts of your organization, such as Support and Sales. Be sure to link the [connector instances](#) in both connector groups to the same bridge server.

- b. Choose the connector you want from the list provided.
- c. Choose the Platform and Version. By default, the latest version is selected.
- d. Click **Save**.
- e. The Connector Details page appears. If you want to use the same connector type but with different configurations, repeat the steps to add another connector group.

Note: Upgrades to PureCloud and its connectors occur regularly. You can easily [upgrade an existing version](#) of the Zendesk Screen Pop Connector.

Configure the Zendesk Screen Pop Connector

To use the Zendesk Screen Pop Connector, add configuration values, CIC and Zendesk credentials, and instances of the connector on the Connector Details page.

Note: Any configuration change requires a connector restart.

To configure the connector, perform these tasks in order:

1. [Access the Connector Details page](#).
2. [Add Configuration values](#).
3. [Add CIC credentials](#).
4. [Add Zendesk credentials](#).
5. [Add a connector instance](#).

Access the Connector Details page

1. In PureCloud, click **Admin**.
2. Under Integrations, click **Bridge**.
3. Click the **Connectors** tab.
4. Click an existing connector Group Name. The Connector Details page appears.

Add Configuration values

To add configuration values for the Zendesk Screen Pop Connector:

1. Go to the Configuration section on the Connector Details page.
2. Add values for the following:

PluginName—a unique name (for example, zendeskscreenpop) given to the log file created for this connector. When running multiple connector instances on the same bridge server, make sure that the value for PluginName is unique for each connector group. The value for PluginName distinguishes the log files of the connector groups from one another.

ServiceUrl—address of the Zendesk service used to connect to the API, typically formatted as `https://{subdomain}.zendesk.com/api/v2`.

ScreenPopInteractionState—interaction state when the screen pop occurs. Set the state to *Alerting* or *Connected*.

ICServerName—name of the CIC server that the connector connects to.

PopNewTicket—optional property that pops a new ticket for the Zendesk Open Ticket By ANI action. Enter 1 to never create a new ticket, 2 to always create a new ticket, or 3 to create a new ticket if an existing one doesn't exist.

3. Click **Save**.
-

Add CIC credentials

1. Go to the Credentials section on the Connector Details page.
2. Under CIC Credentials, click **Change**. A dialog box appears.
3. Add information for the following fields:

CIC User name—logon ID for the CIC server.

CIC Password—password for the CIC server.

4. Click **Update**.
-

Add Zendesk credentials

To add Zendesk credentials for the Zendesk Screen Pop Connector:

1. Go to the **Credentials** section on the Connector Details page.
2. Under Zendesk Credentials, click **Change**. A dialog box appears.
3. Add information for the following fields:

Zendesk User name—logon ID for Zendesk. At a minimum, the user must be an agent in Zendesk.

Zendesk Security Token—API token generated for the Zendesk org.

4. Click **Update**.
-

Add a connector instance

1. In the Connector Details tab, click **Add Instance** in the Instances section.
2. Click **Set Server** to open the Set Server window.
3. Select a bridge server and click **Save**.
4. Click the Enabled button to ON, and then click **Yes** in the Enable Connector Instance window.

5. Click the Start button under Control to turn on the connector.
6. To create more instances, repeat these steps. If you installed more than one instance of the bridge server for fault tolerance, add extra instances of the connector. If you added [multiple connector groups](#) of the same connector type, be sure to link all connector instances in the connector groups to the same bridge server.

Configure screen pop actions for the Zendesk Screen Pop Connector

After starting the Zendesk Screen Pop Connector on the [Connector Details page](#), [four actions](#) are remotely installed on your CIC server. (This CIC server is the one that you added to the Connector Details page for the Zendesk Screen Pop Connector.) Only one set of screen pop actions are installed on your CIC server. For each new connector instance or each restart, the service confirms that the actions exist on the CIC server. No duplicates of the actions are installed.

The next step is to configure screen pop actions for the Zendesk Screen Pop Connector. Complete tasks in order, using the links below to open topics in this documentation. After completing a task, proceed to the next.

Tasks to complete in CIC are:

1. [Configure the Zendesk Open Contact screen pop.](#)
2. [Configure the Zendesk Open Contact By ANI screen pop action.](#)
3. [Configure the Zendesk Open Ticket screen pop action.](#)
4. [Configure the Zendesk Open Ticket By ANI screen pop action.](#)

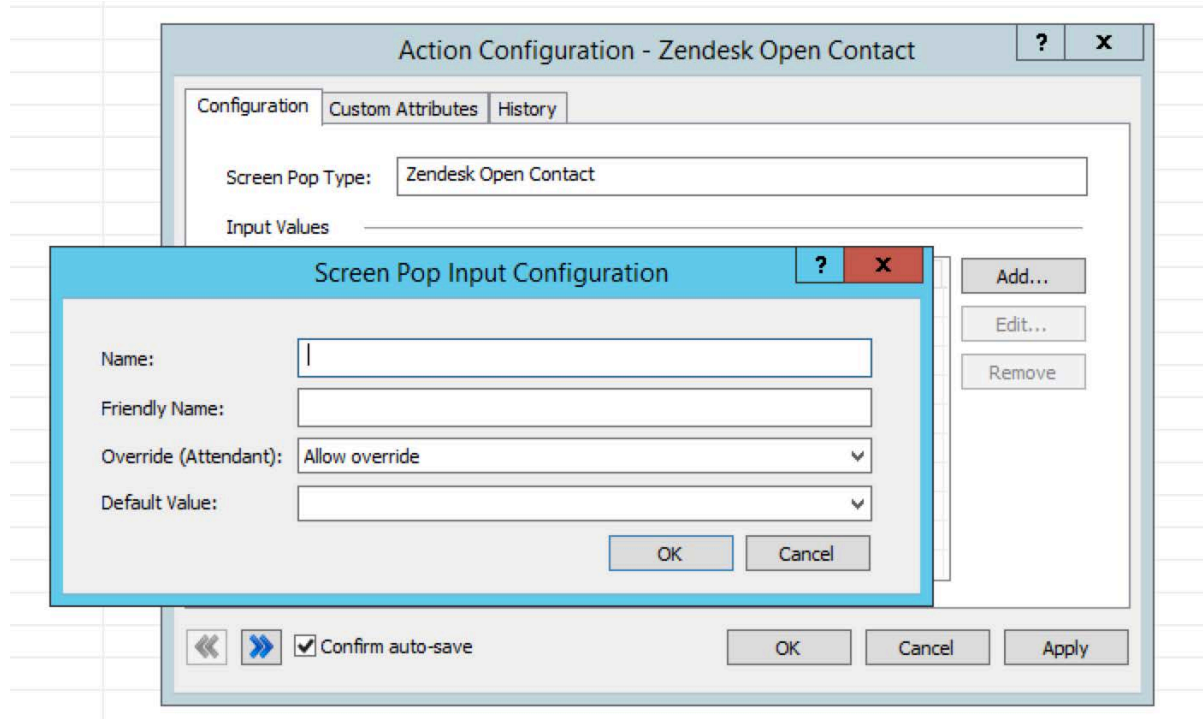
Configure the Zendesk Open Contact screen pop action

The text that you enter in the Input Configuration window is case-sensitive. Enter all text exactly as indicated.

To configure the Zendesk Open Contact screen pop action:

1. Open **Interaction Administrator**.
2. Click **Actions** under System Configuration in the left navigation pane.
3. Double-click **Zendesk Open Contact** in the center pane.
 - a. For Screen Pop Type, enter the name of the action: **Zendesk Open Contact**.
 - b. Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **Id**.
 - ii. For Friendly Name, enter **Id**.
 - iii. For Override (Attendant), select **Allow override**.
 - iv. For Default Value, enter **0**.
 - v. Click **OK**.
 - c. Click **Add**. A Screen Pop Input Configuration window appears.

- i. For Name, enter **Type**.
 - ii. For Friendly Name, enter **Type**.
 - iii. For Override (Attendant), select **Do not allow override**.
 - iv. For Default Value, enter **User**.
 - v. Click **OK**.
- d. Click **Apply**.
 - e. Click **OK**.



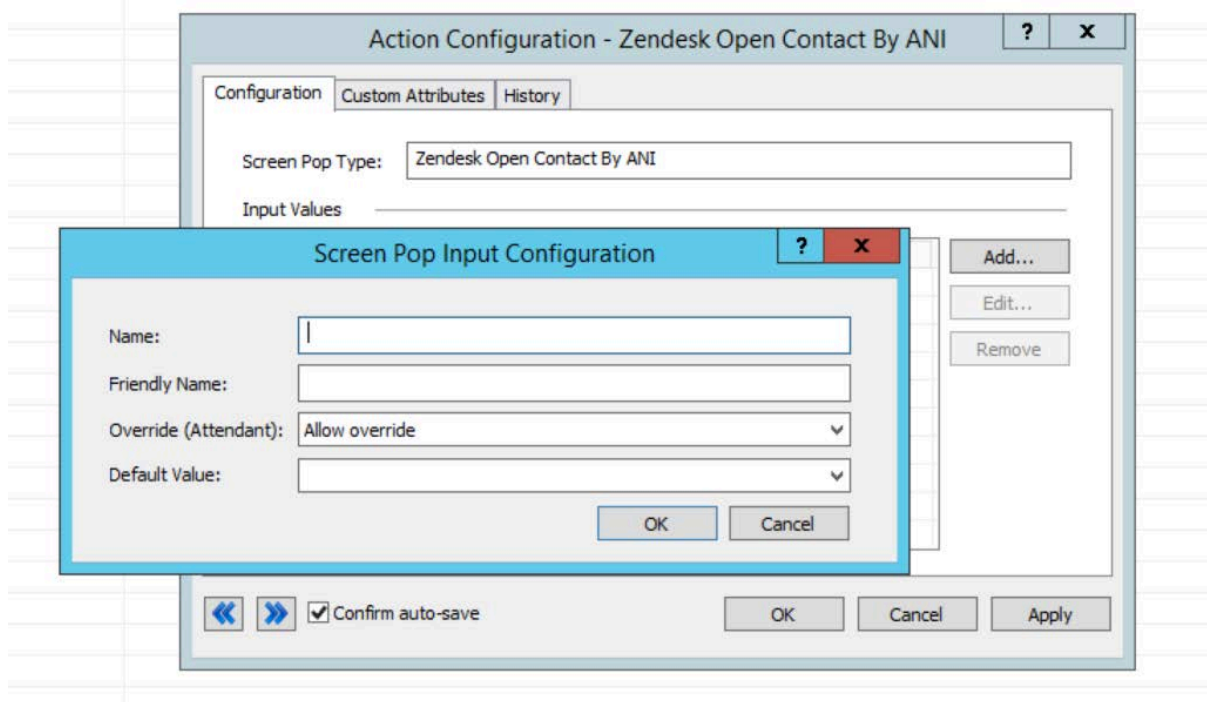
Configure the Zendesk Open Contact By ANI screen pop action

Note: The text that you enter in the Input Configuration window is case-sensitive. Enter all text exactly as indicated.

To configure the Zendesk Open Contact By ANI screen pop action:

1. Open **Interaction Administrator**.
2. Click **Action** under System Configuration in the left navigation pane.
3. Double-click **Zendesk Open Contact By ANI** in the center pane.
 - a. For Screen Pop Type, enter the name of the action: **Zendesk Open Contact By ANI**.
 - b. Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **Id**.
 - ii. For Friendly Name, enter **ANI**.
 - iii. For Override (Attendant), select **Allow override**.
 - iv. For Default Value, enter **0**.

- v. Click **OK**.
- c. Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **Type**.
 - ii. For Friendly Name, enter **Type**.
 - iii. For Override (Attendant), select **Do not allow override**.
 - iv. For Default Value, enter **User_Ani**.
 - v. Click **OK**.
- d. Click **Apply**.
- e. Click **OK**.



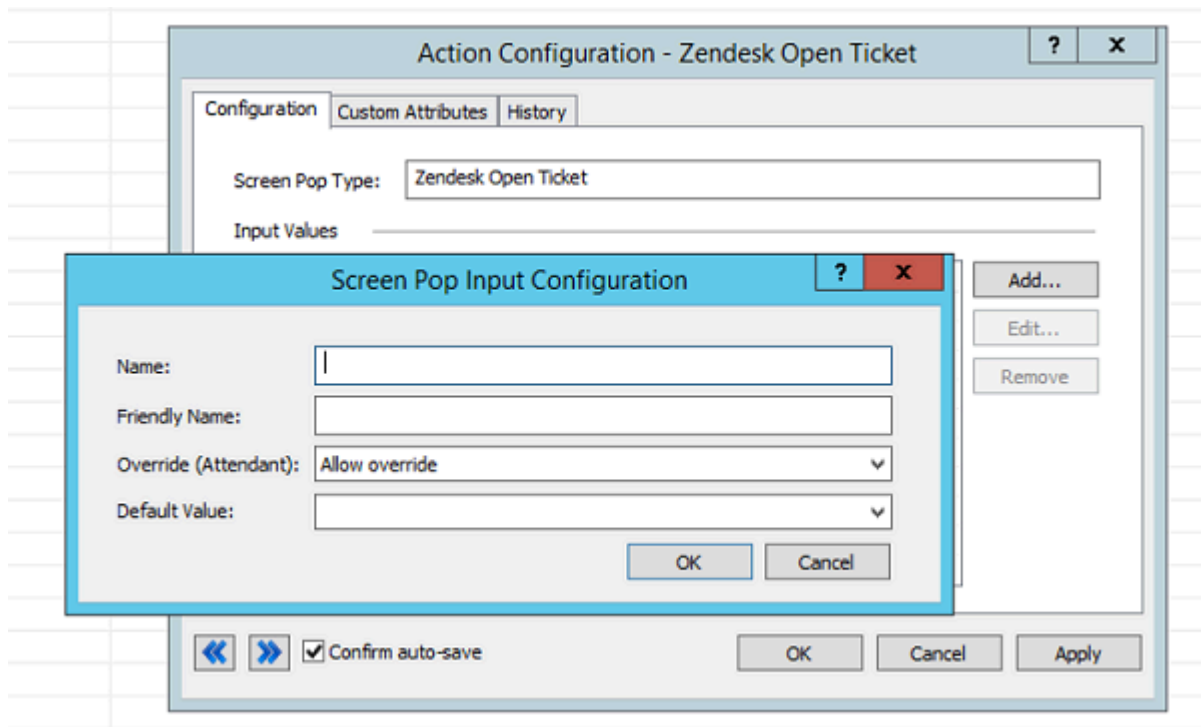
Configure the Zendesk Open Ticket screen pop action

Note: The text that you enter in the Input Configuration window is case-sensitive. Enter all text exactly as indicated.

To configure the Zendesk Open Ticket screen pop action:

1. Open **Interaction Administrator**.
2. Click **Action** under System Configuration in the left navigation pane.
3. Double-click **Zendesk Open Ticket** in the center pane.
 - a. For Screen Pop Type, enter the name of the action: **Zendesk Open Ticket**.
 - b. Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **Id**.
 - ii. For Friendly Name, enter **Id**.
 - iii. For Override (Attendant), select **Allow override**.

- iv. For Default Value, enter **0**.
- v. Click **OK**.
- c. Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **Type**.
 - ii. For Friendly Name, enter **Type**.
 - iii. For Override (Attendant), select **Do not allow override**.
 - iv. For Default Value, enter **Ticket**.
 - v. Click **OK**.
- d. Click **Apply**.
- e. Click **OK**.



Configure the Zendesk Open Ticket By ANI screen pop action

Note: The text that you enter in the Input Configuration window is case-sensitive. Enter all text exactly as indicated.

To configure the Zendesk Open Ticket By ANI screen pop action:

1. Open **Interaction Administrator**.
2. Click **Action** under System Configuration in the left navigation pane.
3. Double-click **Zendesk Open Ticket By ANI** in the center pane.
 - a. For Screen Pop Type, enter the name of the action: **Zendesk Open Ticket By ANI**.
 - b. Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **Id**.
 - ii. For Friendly Name, enter **ANI**.

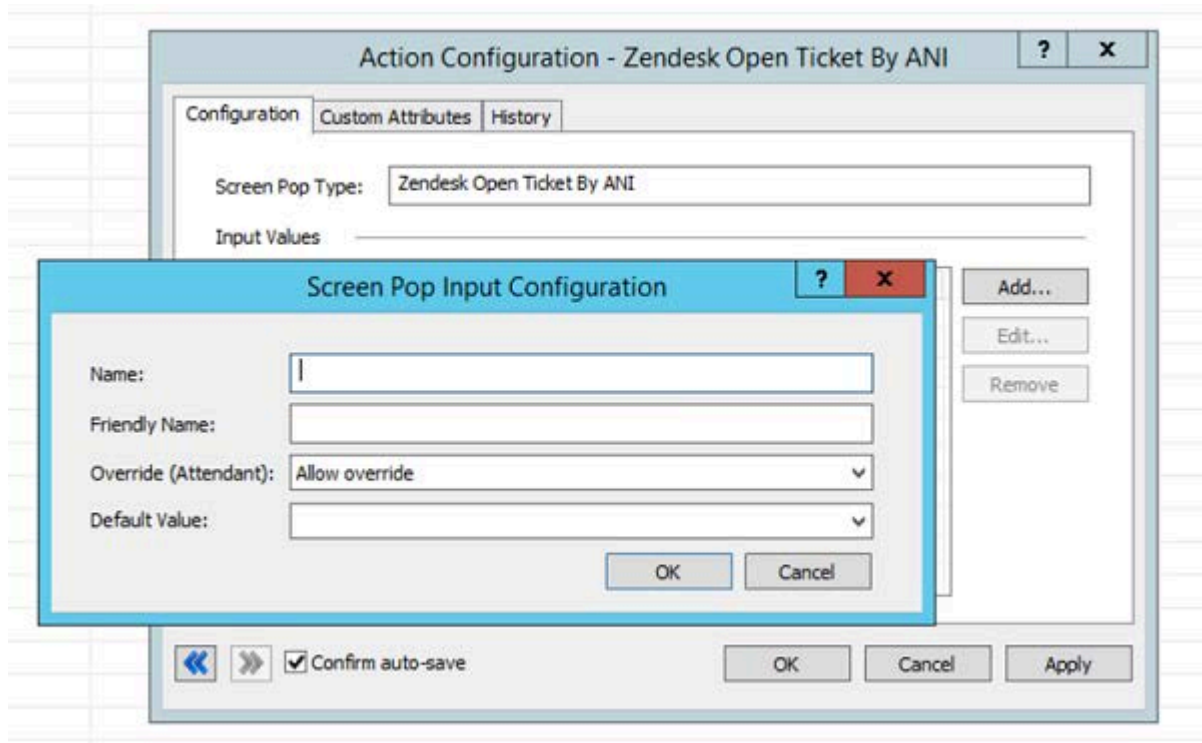
- iii. For Override (Attendant), select **Allow override**.
- iv. For Default Value, enter **0**.
- v. Click **OK**.
- c. Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **Type**.
 - ii. For Friendly Name, enter **Type**.
 - iii. For Override (Attendant), select **Do not allow override**.
 - iv. For Default Value, enter **Ticket_Ani**.
 - v. Click **OK**.

If setting a [custom field in Zendesk](#), continue with steps d and e. Otherwise, skip to step f.

- d. (Optional) Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **CustomData**.
 - ii. For Friendly Name, enter **CustomData**.
 - iii. For Override (Attendant), select **Allow override**.
 - iv. For Default Value, enter a descriptive name for what you are returning, for example, Event ID.
 - v. Click **OK**.
- e. (Optional) Click **Add**. A Screen Pop Input Configuration window appears.
 - i. For Name, enter **CustomField**.
 - ii. For Friendly Name, enter **CustomField**.
 - iii. For Override (Attendant), select **Allow override**.
 - iv. For Default Value, enter the Zendesk custom field ID, for example, 23914647.

Note: To find the custom field ID in Zendesk, click the gear icon, **Ticket Fields**, and then **edit** next to a custom field. The custom field ID appears at the top of the page.

- v. Click **OK**.
- f. Click **Apply**.
- g. Click **OK**.



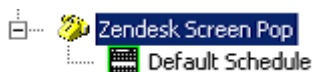
After configuration, the screen pop actions appear in Interaction Attendant.

Next, [configure Interaction Attendant](#).

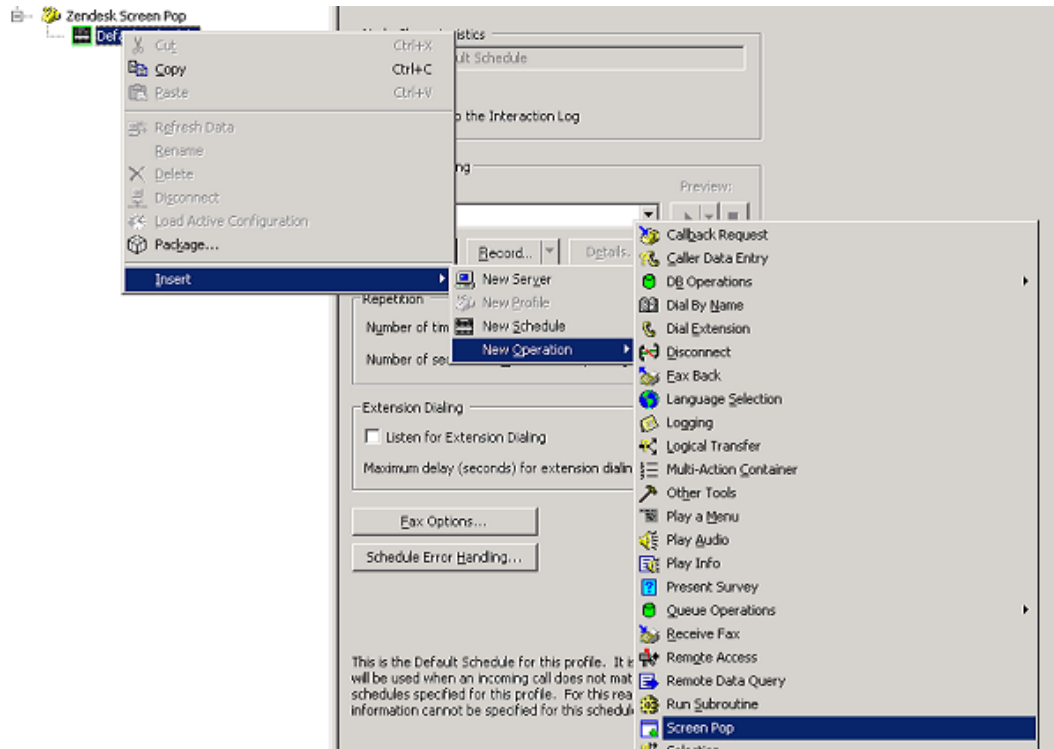
Configure Interaction Attendant for the Zendesk Screen Pop Connector

To activate the Zendesk Screen Pop Connector, apply the corresponding screen pop action in Interaction Attendant to each of the interactions that you want to cause a screen pop in Zendesk. When applying these actions, fill in the required information for each action.

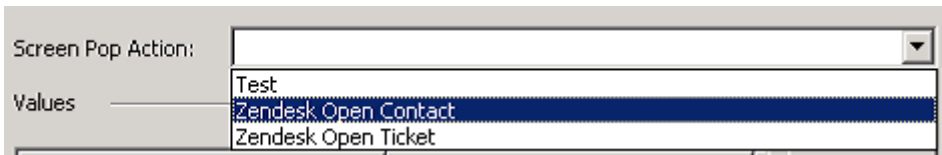
1. Add a profile (or modify an existing one) in Interaction Attendant.



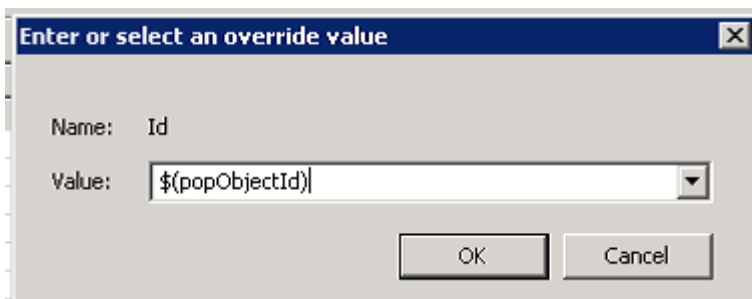
2. To add a new screen pop action:
 - a. Right-click **Default Schedule**.
 - b. Choose **Insert > New Operation > Screen Pop**.



3. In the Screen Pop Action menu, select the type of screen pop you want.



4. To specify the input value, double-click the row in the Values table.



The input value is used to identify the object to be popped within Zendesk. This element is the popped object CustomData, CustomField, ID, or the caller's ANI, depending on the screen pop action used.

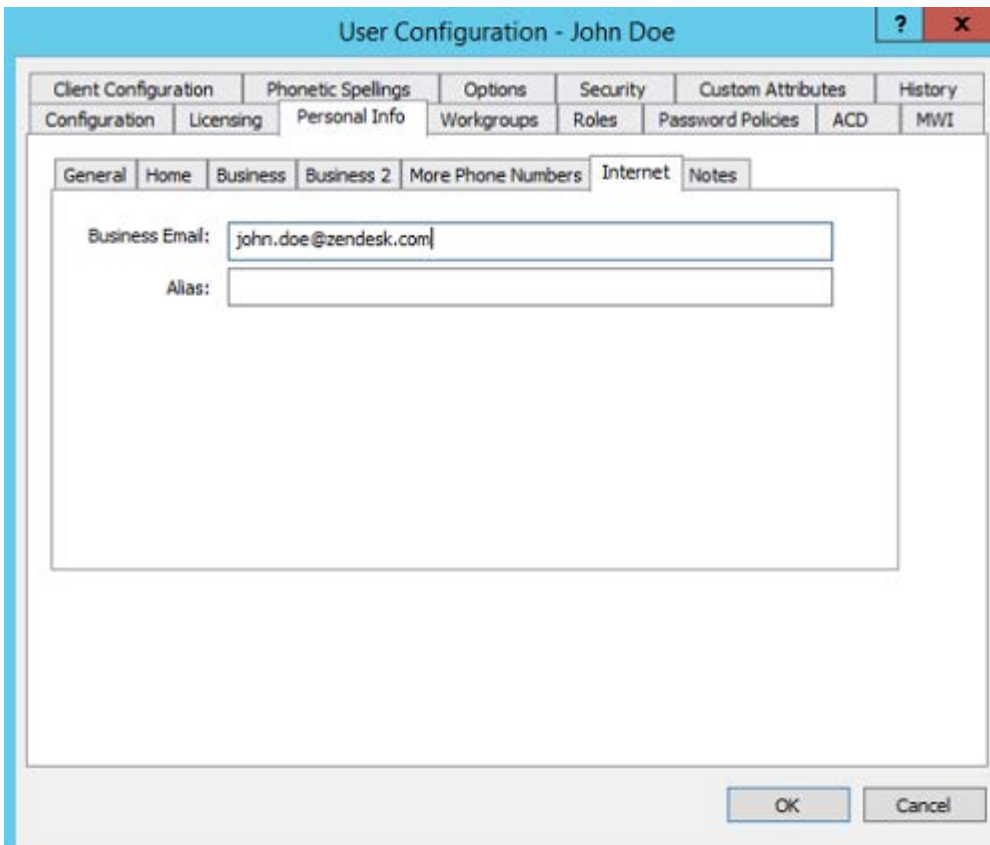
Note: Because the requirements for setting custom fields vary based on the type of field, refer to [Zendesk's API](#).

For information about publishing configurations, see *Interaction Attendant Help* from the Help menu in the application.

Configure user email addresses for the Zendesk Screen Pop Connector

For agents to receive screen pops, add their Zendesk email addresses to their user profiles in Interaction Administrator.

1. Open **Interaction Administrator**.
2. Click **Users** under People in the left navigation pane.
3. If the user does not exist, add the necessary information to set up a new user. For information on how to set up a new user, see Interaction Administrator Help.
4. If the user exists, double-click the user name.
5. In the User Configuration dialog box, select the **Personal Info** tab and then the **Internet** tab.
6. In the Business Email text box, enter the email address used as the Zendesk logon for this agent. The email in this text box links the CIC user name to the Zendesk account so the Zendesk agent can receive screen pops.



The screenshot shows a dialog box titled "User Configuration - John Doe". It has a tabbed interface with the following tabs: Client Configuration, Phonetic Spellings, Options, Security, Custom Attributes, History, Configuration, Licensing, Personal Info, Workgroups, Roles, Password Policies, ACD, and MWI. The "Personal Info" tab is selected, and within it, the "Internet" sub-tab is active. The "Business Email" field contains the text "john.doe@zendesk.com" and the "Alias" field is empty. At the bottom right, there are "OK" and "Cancel" buttons.

7. Click **OK**. The Zendesk agent's email address is now configured in Interaction Administrator and the Zendesk agent will receive screen pops.

Troubleshoot the Zendesk Screen Pop Connector

Refer to these articles if you need to troubleshoot Zendesk Screen Pop Connector:

- [Connector log files](#)
- [Server log files](#)
- [CIC server switchover](#)
- [Connector failed to start](#)
- [No screen pop occurs](#)
- [Unable to connect to the Zendesk server](#)

Connector log files

Note: Information provided includes descriptions about the log files and the location of the files. To view or work with the log files, contact PureCloud support. You can also view event logs in the [History tab](#) in PureCloud.

The connector includes standard log files that record all events that have occurred in the execution of the programs. These files allow for tracking and diagnosis. There are two types of connector log files:

- **ininbridgehost_{X}**: these log files are created when the bridge server loads the connector.
- **{connector group name}_{X}.ininlog**: these log files include both traces from connector and configuration loading, and any traces logged by the connector. These log files are created every day and each time the connector is restarted.

For copies of these log files, follow these steps:

1. Go to the Connector Details page.
 - a. Click **Admin**.
 - b. Under Integrations, click **Bridge**.
 - c. Click the **Connectors** tab.
 - d. Click the connector whose log files you want to view.
2. In the Instances section, click **Logs**.
3. Click **Request Connector logs**.
4. Click a file to download. Both types of connector log files are included in the downloaded zip file.

Server log files

Note: Information provided includes descriptions about the log files and the location of the files. To view or work with the log files, contact PureCloud support. You can also view event logs in the [History tab](#) in PureCloud.

The bridge server includes its own logging system for logging information about the internals of the server. These log files contain low-level process details that can describe any problems with starting the server as a whole or with receiving messages. For example, if the Windows processes of the server do not start or there are no relevant traces in the connector log files, check the bridge server log files.

There are four types of server log files:

- **ininbridgeprocesslauncher.ininlog**: these log files record information about bridge server processes, such as failures and restarts.
- **ininbridgeserver_{X}.ininlog**: these log files include information about the management of the connectors and their processes.
- **ininbridgeservices_{X}.ininlog**: these log files include information about communication between the bridge server and Amazon Web Services.
- **ininupdate_{X}.ininlog**: these log files record information about the bridge server shutting down, installing a new update package, and then restarting.

For copies of these log files, follow these steps:

1. Go to the Server Details page.
 - a. Click **Admin**.
 - b. Under Integrations, click **Bridge**.
 - c. Click the **Servers** tab.
 - d. Click the server whose log files you want to view.
2. Click **Logs**.
3. Click **Request server logs**.
4. Click a file to download.

CIC server switchover

A CIC server switchover requires having two CIC servers installed: one as the primary CIC server and another as the backup CIC server. When a CIC switchover occurs, the primary CIC server goes down and the backup CIC server becomes the new primary CIC server. The Bridge connector then creates a connection to the new primary CIC server.

Connector failed to start

Problem

The connector failed to start.

Causes

The connector can fail to start for the following reasons:

- The Zendesk user permissions are incorrect.
- The Zendesk credentials in the connector configuration are incorrect.
- The CIC credentials in the connector configuration are incorrect.
- Some other unspecified error occurred.

Solutions

- Confirm that the requirements for [Zendesk agents](#) have been met.
 - Confirm the [Zendesk credentials](#) in the connector configuration.
 - Confirm the [CIC credentials](#) in the connector configuration.
 - Check the connector log files for information about errors.
-

No screen pop occurs

Problem

A screen pop fails to occur.

Causes

A screen pop may fail to occur for several reasons:

- An API call to Zendesk failed.
- If no screen pop occurs for Zendesk Open Contact By ANI:
 - The caller has never called from this phone number.
 - There are multiple users in the database with the same phone number.
- If no screen pop occurs for Zendesk Open Ticket By ANI:
 - The user has no open tickets in Zendesk.
 - There are multiple users in the database with the same phone number.

Solutions

- API call failure
 - Check the connector log files to confirm that an API call to Zendesk failed.
 - Wait for the connector to attempt to retrieve information from Zendesk again.

Note: Entries added or updated in Zendesk may not be available for use by the connector for up to 10 minutes.

- Reduce the number of API calls you make to Zendesk.
 - Confirm that the Zendesk credentials in the connector configuration are correct.
- Open Contact By ANI failure
 - The agent must manually navigate to the correct user record or create a new user record in Zendesk.
- Open Ticket By ANI failure

- The agent must manually navigate to the correct ticket or create a new ticket in Zendesk.

Unable to connect to the Zendesk server

Problem

The connector is unable to connect to the Zendesk server.

Causes

This issue is typically due to invalid or missing server credentials in the connector configuration. However, this issue can also be due to security settings blocking network traffic or to an outage of the Zendesk server.

Solutions

- Confirm the connector configuration settings.
 - Zendesk Username: logon ID for Zendesk. At a minimum, the user must be an agent in Zendesk.
 - Zendesk Security Token: API token generated for the Zendesk org
- If the issue is not due to incorrect configurations, confirm that the connection to the connector was successful.

Check the Interactive Intelligence log file for the following.

```
ZendeskPlugin.ConfigureApi : Attempting to connect to ZenDesk with user:
'[Zendesk administrator's user email address] at url:
https://inintest.zendesk.com/api/v2>ININZendeskApi.Configure : Configuring
ZendeskAPI for user: '[Zendesk administrator's user
email address]' at url: https://inintest.zendesk.com/api/v2
CrmPluginFactory.CreatePlugin : Created new ZenDesk plugin
```

- If these messages exist, the connection was successful.
- If they do not exist, the connection was not successful. Check the security settings and [firewall permissions](#) for your network connection.
- Confirm the settings for the user account in Zendesk. If the Zendesk user does not have access to the API, the connector cannot connect to Zendesk.

```
ININZendeskApi.Configure : Top Exception
```

```
Type=ININ.Alliances.Common.BadCredentialsException
Source=inin.zendesk.api-w64r-15-3
Message=User: [Zendesk administrator's user email address] was forbidden
from logging in. Please check the credentials, and verify user access
StackTrace:
    at ININ.Zendesk.Api.ININZendeskApi.Configure(String serverUrl, String
userName, String token) in
c:\workspace\jenkins_workspace\workspace\alliances-zendesk-
common\src\api\ININZendeskApi.cs:line 55
```

- Confirm that the requirements for [Zendesk agents](#) have been met.

Copyright and Trademark Information

Interaction Dialer and *Interaction Scripter* are registered trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2000-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Messaging Interaction Center and *MIC* are trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2001-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Director is a registered trademark of Genesys Telecommunications Laboratories, Inc. *e-FAQ Knowledge Manager* and *Interaction Marquee* are trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2002-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Conference is a trademark of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2004-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction SIP Proxy and *Interaction EasyScripter* are trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2005-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Gateway is a registered trademark of Genesys Telecommunications Laboratories, Inc. *Interaction Media Server* is a trademark of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2006-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Desktop is a trademark of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2007-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Process Automation, Deliberately Innovative, Interaction Feedback, and Interaction SIP Station are registered trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2009-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Analyzer is a registered trademark of Genesys Telecommunications Laboratories, Inc. *Interaction Web Portal* and *IPA* are trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2010-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Spotability is a trademark of Genesys Telecommunications Laboratories, Inc. ©2011-2017. All rights reserved.

Interaction Edge, CaaS Quick Spin, Interactive Intelligence Marketplace, Interaction SIP Bridge, and Interaction Mobilizer are registered trademarks of Genesys Telecommunications Laboratories, Inc. *Interactive Intelligence Communications as a ServiceSM* and *Interactive Intelligence CaaSSM* are trademarks or service marks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2012-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Speech Recognition and *Interaction Quality Manager* are registered trademarks of Genesys Telecommunications Laboratories, Inc. *Bay Bridge Decisions* and *Interaction Script Builder* are trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2013-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interaction Collector is a registered trademark of Genesys Telecommunications Laboratories, Inc. *Interaction Decisions* is a trademark of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2013-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

Interactive Intelligence Bridge Server and *Interaction Connect* are trademarks of Genesys Telecommunications Laboratories, Inc. The foregoing products are ©2014-2017 Genesys Telecommunications Laboratories, Inc. All rights reserved.

The veryPDF product is ©2000-2017 veryPDF, Inc. All rights reserved.

This product includes software licensed under the Common Development and Distribution License (6/24/2009). We hereby agree to indemnify the Initial Developer and every Contributor of the software licensed under the Common Development and Distribution License (6/24/2009) for any liability incurred by the Initial Developer or such Contributor as a result of any such terms we offer. The source code for the included software may be found at <http://wpflocalization.codeplex.com>.

A database is incorporated in this software which is derived from a database licensed from Hexasoft Development Sdn. Bhd. ("HDSB"). All software and technologies used by HDSB are the properties of HDSB or its software suppliers and are protected by Malaysian and international copyright laws. No warranty is provided that the Databases are free of defects, or fit for a particular purpose. HDSB shall not be liable for any damages suffered by the Licensee or any third party resulting from use of the Databases.

Other brand and/or product names referenced in this document are the trademarks or registered trademarks of their respective companies.

DISCLAIMER

GENESYS TELECOMMUNICATIONS LABORATORIES (GENESYS) HAS NO RESPONSIBILITY UNDER WARRANTY, INDEMNIFICATION OR OTHERWISE, FOR MODIFICATION OR CUSTOMIZATION OF ANY GENESYS SOFTWARE BY GENESYS, CUSTOMER OR ANY THIRD PARTY EVEN IF SUCH CUSTOMIZATION AND/OR MODIFICATION IS DONE USING GENESYS TOOLS, TRAINING OR METHODS DOCUMENTED BY GENESYS.

Genesys Telecommunications Laboratories, Inc.
2001 Junipero Serra Boulevard
Daly City, CA 94014
Telephone/Fax (844) 274-5992
www.genesys.com

Release notes for the Zendesk Screen Pop Connector

This article describes all Zendesk Screen Pop Connector releases.

2018 R1

Updated Copyright and Trademark Information. Applied Genesys terminology and branding.

zendeskscreenpop-CIC2015r2

Version	Release Date	Description
15.2.6.221	January 6, 2016	Made improvements to internal components.
R15.2.6.219	December 7, 2015	Creation of new tickets for calls from private numbers.
15.2.6.201	October 14, 2015	Added configuration for the Zendesk Open Ticket By ANI action to pop a new ticket never, always, or only when an existing ticket isn't found. Added ability to add custom data to new tickets popped by the Zendesk Open Ticket By ANI action by setting a custom field in Zendesk.
15.2.6.75	March 24, 2015	Initial release of the CIC version of the connector