# Zendesk Setup guide

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# Zendesk Setup Guide

## Disclaimer

This document covers the current beta setup process of connecting a Zendesk account to Rdentify's services. This means that the process in this document can change at any time, we do our best to provide an up to date guide to match the current version of Rdentify and process required in connecting with Zendesk.

The setup process requires no development work to be undertaken on the clients systems. All the integrations are created using existing tools such as API's, Webhooks and Rdentify's custom plugin that is already developed.

Where applicable, the Rdentify Account Managers will provide the client with any additional technical information such as Webhook URL's and files needed for plugins.

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Rdentify uses three simple methods of implementation to get data in and out of Rdentify - API connection, Webhooks and a custom plugin.

As part of your onboarding with us, you'll be asked to provide unique information to identify your Zendesk account that will make your integration with us secure and unique from everyone else.

The following document shows you how we integrate directly with Zendesk so that we can automate your workflows with Rdentify.

In order to integrate you'll need to action the following from within your current Zendesk account:

## API Connection

An API connection allows Rdentify to connect to your Zendesk account to access the conversation data (tickets, emails and chats) and analyse them and saves these scores in your Rdentify.com workspace for you to review.

## Webhooks

A webhook is a live event trigger that is provided by Zendesk, meaning that when certain actions are performed within Zendesk it can send a notification immediately to the provided webhok URL's. Rdentify makes use of this technology to get chats in real time, each time a chat message is submitted - Zendesk can trigger a webhook and send the new chat text to Rdentify's system.

## Plugin

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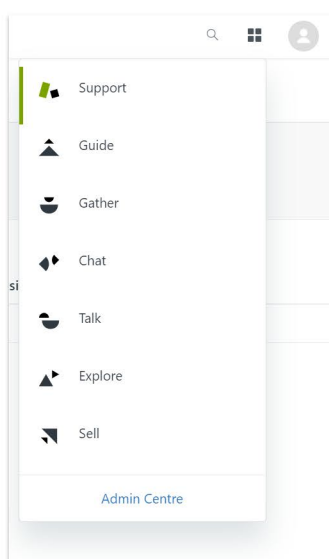
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### Create an API Key

You'll need to provide us with an API key so Rdentify can pull chat and email data.

In order to set this up, while logged in as an admin navigate to the Admin Centre, this can be found at the bottom of the products menu in the top right of Zendesk.

Once the admin center has loaded, you'll be faced with a new menu on the left hand side of the page.

In this menu you can expand the "Apps and integrations" item where inside you'll find the "Zendask API" option under the APIs heading.

Click this to open up the API interface.
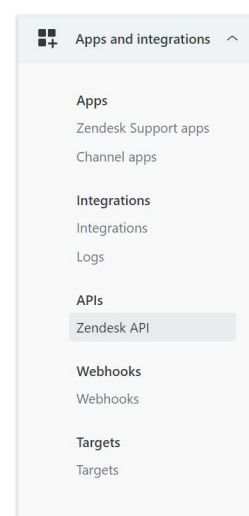
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You'll now be presented with the main API settings, we recommend using the following options:

• Password access - Disabled
• Token access - Enabled

For Rdentify to connect we will be requiring the Token access so we do not recommend enabling Password access, but do check if you have other connections using Password access before you disable it.



Now click the "Add API token" button, after a couple of seconds the key will be generated and displayed as illustrated.

Enter in a description to help you remember that this is a key required for Rdentify.

As the notice says, the API key will never be viewable in full again via Zendesk once saved. It is a good idea to copy and paste the key into a document stored safely locally.
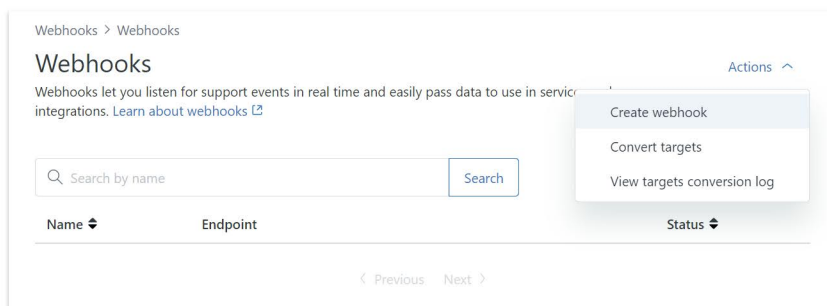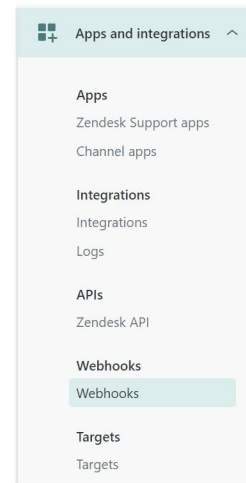


Click save.

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## Create Webhooks

Again in the "Admin Center" menu, underneath API's is Webhooks. Open up this settings page.

Unless you already have any set up then this page shall be empty. Using the "Actions" menu in the top right - select the 'Create Webhook' option

Your Rdentify account manager will provide you with all the necessary information to fill out this form.

Depending on your configuration you may have to repeat this process for multiple webhooks.

Give the webhook a unique name and a helpful description.

Enter the supplied Endpoint URL.

Make sure the Request Method is set to "POST" and Request format "JSON".

Unless otherwise instructed, leave Authentication as "None".
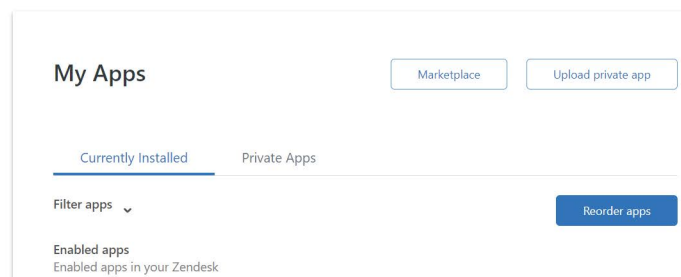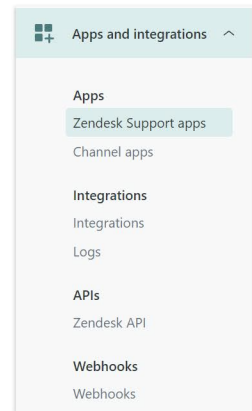
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## Upload the Rdentify App

In the "Admin Center" menu, underneath Apps is Zendesk Support apps. Open up this settings page.

In here you will see any apps already installed, we'll be uploading the provided Rdentify App here by clicking the "Upload Private App" button at the top.

Enter "Rdentify" as your App Name and using the file uploader, select the Rdentify Plugin ZIP folder that will have been provided to you by your account manager and click "Upload".

You will then be prompted to confirm and accept a brief list of Zendesk terms, click "Upload".

The installation process will then being, this may take a few seconds to a minute. Once completed you will be returned to the "My Apps" main settings page where you will now see the Rdentify app enabled.

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## Connecting to Rdentify

To connect your unique Rdentify workspace to your Zendesk account we will then need you to provide us with the following information:

• An agents email address that's registered in Zendesk with an administrator role
• The API key we just generated for Rdentify

Once we have the above provided, our engineers will connect your Zendesk to your Rdentify workspace. Once connected, Rdentify will get to work analysing your conversations and providing scores.

## Supporting Resources

https://support.zendesk.com/hc/en-us/articles/4408889192858-Generating-a-new-API-token

https://support.zendesk.com/hc/en-us/articles/4408839108378-Creating-webhooks-in-Admin-Center

https://developer.zendesk.com/documentation/apps/getting-started/uploading-and-installing-a-private-app/