Gplus Adapter for Zendesk Help

Premier Edition Cloud Draft

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Gplus Adapter for Zendesk Help

Welcome to the *VCC Gplus Adapter for Zendesk Help*. The Genesys Cloud – Premier Edition: VCC Gplus Adapter for Zendesk is a software solution that controls the *look and feel* and behavior of the Agent Desktop when deployed in Zendesk.

VCC Gplus Adapter for Zendesk Help

About This Help

The following topics explain the different features of **Gplus Adapter for Zendesk**:

Administrator Tasks

Find out more information about the administrator tasks, including:

Installing and configuring the Agent Desktop in Zendesk

Agent Tasks

Find out more information about the agent tasks, including:

Gplus Adapter for Zendesk Supported Features

Premier Edition Resources

VCC Documentation Resources and Contacting Genesys Customer Care

Do you need more information about the VCC solution? The following documentation might be able to help you:

- The *VCC Release Note* gives you all the information about new features, modifications, or any known UI behaviors/limitations.
- The *VCC Solution Guide* gives you an overview of Virtual Contact Center (VCC) and are intended for use by administrators, supervisors, and agents. These topics also describe the product functionality and the user interfaces (UI), such as user

accounts, routing, outbound campaigns, call recording, data recording, and historical reporting.
- The *VCC Dashboard Help* gives you the information that you need to use the VCC Dashboard application.
- The *VCC Agent Desktop Help* gives you the information that you need to use the VCC Agent Desktop application.
- The *CX Analytics Help* gives you the information that you need to use the CX Analytics' VCC historical reports.
- The *CX Builder Help* gives you information on how to use CX Builder.
- The *VCC CTI Adapter for Salesforce Help* gives you the information that you need to use the VCC CTI Adapter for Salesforce application.
- The *VCC CTI Adapter for Zendesk Help* gives you the information that you need to use the VCC CTI Adapter for Zendesk application.
- The *VCC CTI Adapter for NetSuite Help* gives you the information that you need to use the VCC CTI Adapter for NetSuite application.

Additional information on Genesys Telecommunications Laboratories, Inc. is available on our Customer Care website.

Contacting Genesys Customer Care for the Cloud

Need additional assistance with using your Genesys Cloud solution? We’re happy to help. Just contact us using one of the phone numbers listed on the following page: Cloud Contact Phone Numbers.

Administrator Tasks

The VCC Gplus Adapter for Zendesk (Agent Desktop) allows you to get set up your contact center agents to begin accepting calls.

To create your Zendesk call center, see Installing and configuring the adapter in Zendesk

Prerequisites

Before proceeding with the setup, you must do the following:

- Install the latest stable version of:
  - Microsoft Internet Explorer 10 and 11
  - Google Chrome 22+
  - Firefox 15+
- Check to make sure that VCC is enabled through the IVR and that an ACD Queue is configured.
  - Refer to the Call Flow Architecture topic and the ***CX Builder Help*** for more information on setting up your IVR.
  - Refer to the Routing section for more information on how to set up your ACD Queue.
  - Refer to the Getting Started topic for more information about VCC.

Hardware and Browser Support

The minimum hardware requirements that your workstations must have is the following:

- Intel Core 2 Duo CPU 2.6 GHz, or similar with at least two cores
- 2 GB Memory

The following browsers are supported for the Adapter:

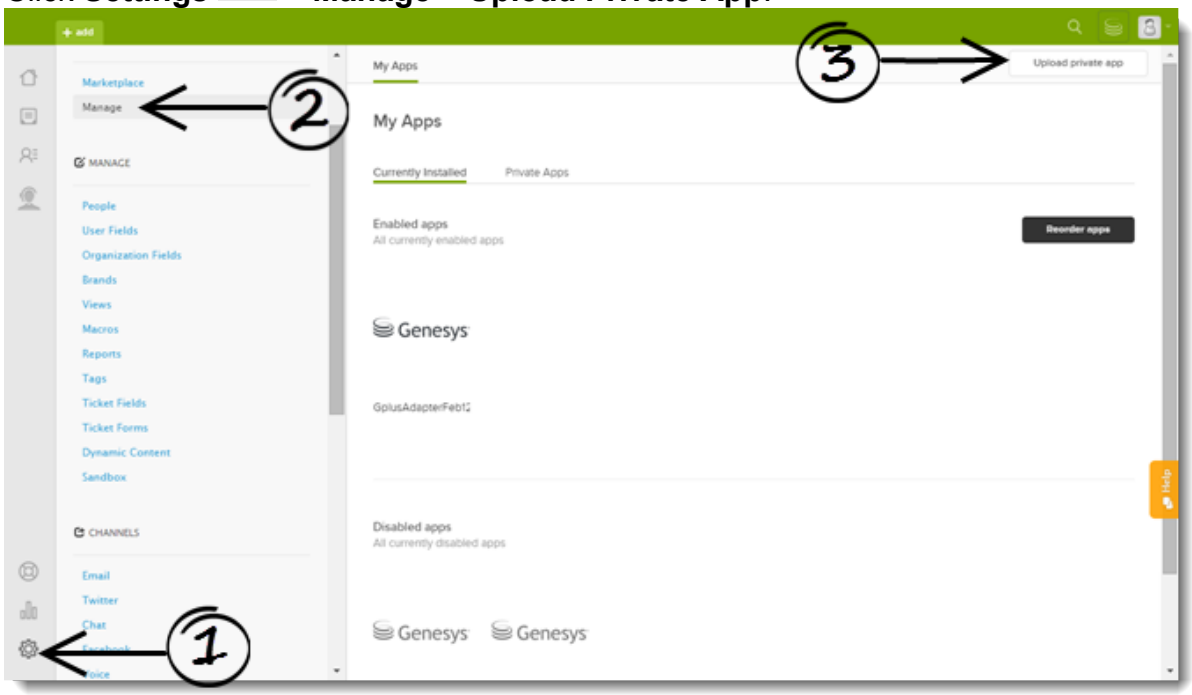
- Microsoft Internet Explorer 10 and 11
- Google Chrome 22+
- Firefox 15+

Installing and configuring the adapter in Zendesk

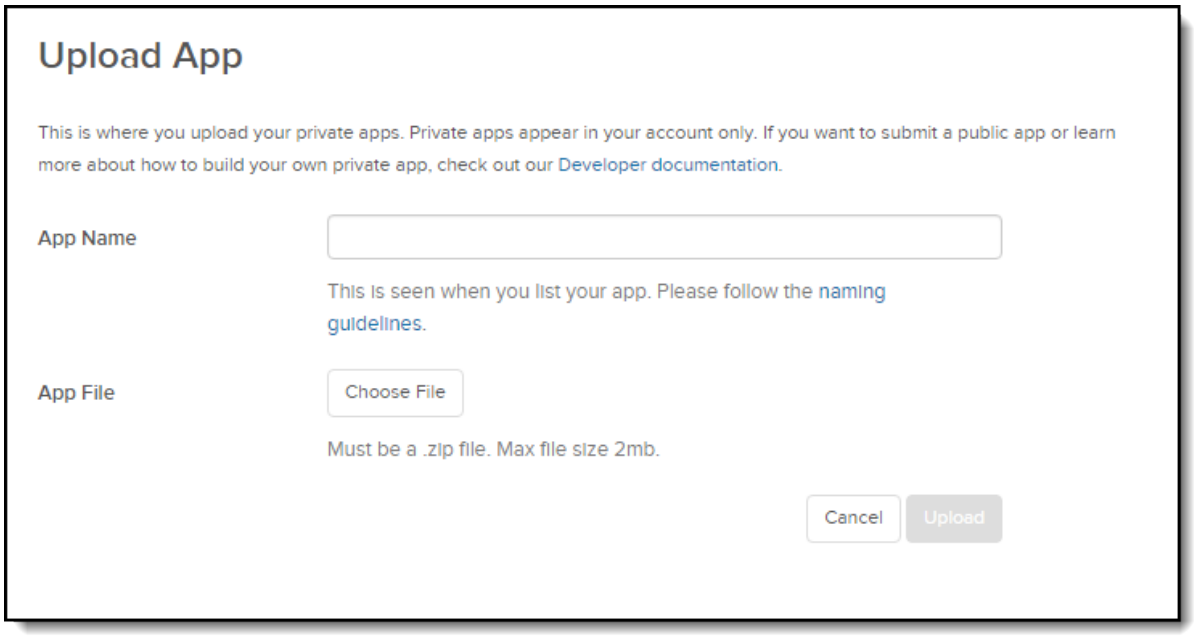
Before you install the adapter, contact Genesys to obtain the link to the installation package.

Start

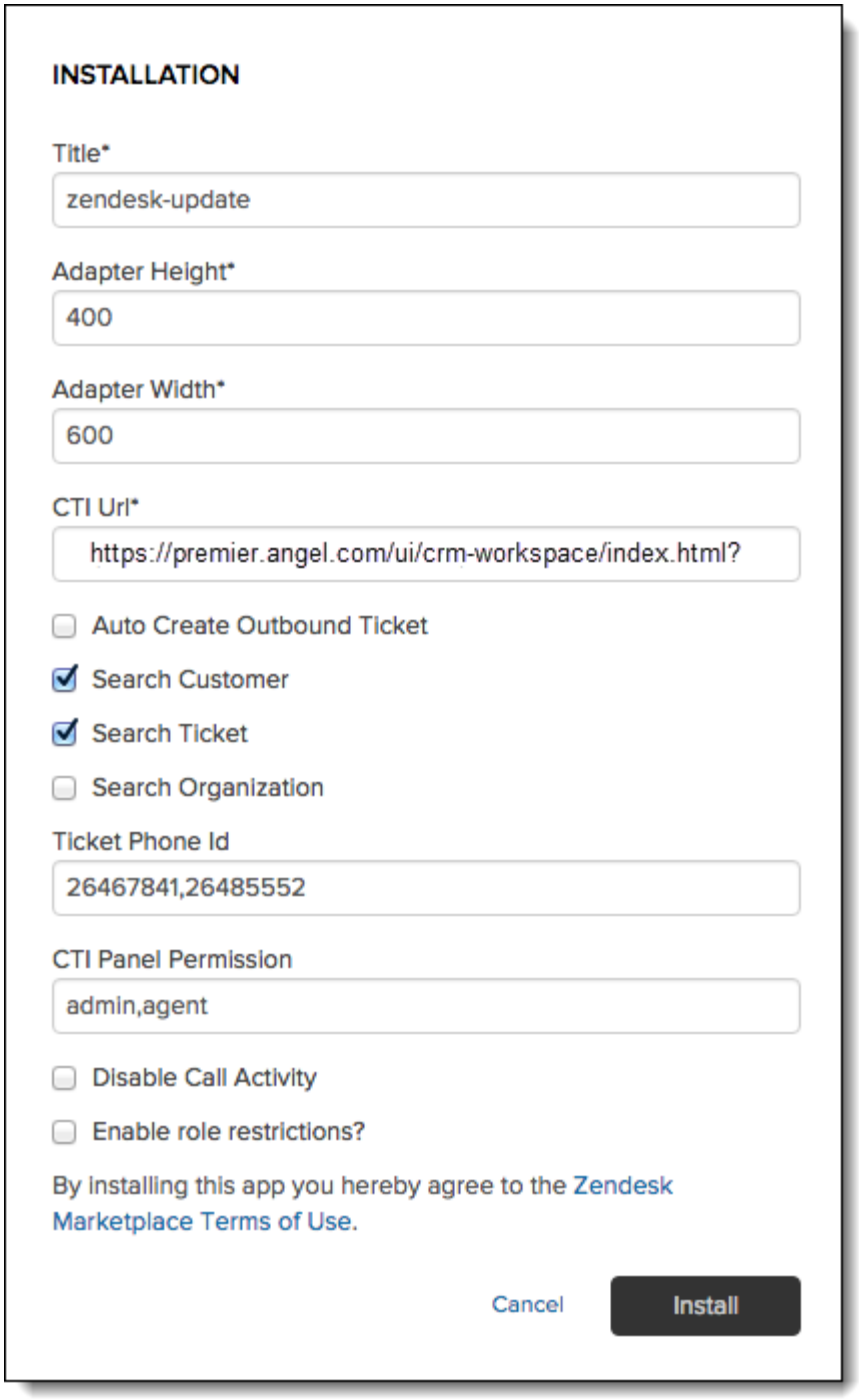
1. Download the installation package to your computer. Don't unzip the package on your computer. The Zendesk application installer will unzip the file.
2. Log in to Zendesk.
3. Click **Settings** > **Manage** > **Upload Private App**.



4. Type a name for the adapter. To ensure that the name is recognized by the initialization script, use the following format for the name: *<app_name>.**
5. In the **App File** section, click **Choose File** and then select the zip file.



6. Click **Upload**. If a warning message is displayed, click **Upload** on the message to continue.
7. On the **Installation** page, configure the installation parameters.



8. Click **Install**.

End

When the installation process is complete, the adapter appears as a private application in the list on the **Installed Apps** page.

Installation Parameters

Field	Description
Adapter Height	Type `400`.
Adapter Width	Type `600`.
CTI URL	Type `https://premier.angel.com/ui/crm-workspace/index.html?crm=zendesk`
Auto Create Outbound Ticket	Automatically creates a ticket during call wrap-up if one does not already exist.
Search Customer	Allows customer records to be searched for an incoming call.
Search Ticket	Allows ticket records to be searched for an incoming call.
Search Organization	Allows organization records to be searched for an incoming call.
Ticket Phone Id	Enter the comma-separated IDs of custom phone fields for user and ticket records.
CTI Panel Permission	Type `User`.
Disable Call Activity	Prevents activity from being logged in the ticket when a call is wrapped up.
Enable role restrictions	If you want to restrict access to your app to only administrators or only agents, click **Enable Role Restrictions** and choose the users.

Agent Tasks

The adapter provides a simple and intuitive Agent Desktop for you to use to manage calls. The Agent Desktop is displayed to you if you are:

- using a machine that has the Agent Desktop installed
- assigned to an appropriate contact center

The following topics explain more about how you can manage your calls:

- Using the Agent Desktop
- Supported features
- Agent Desktop Help

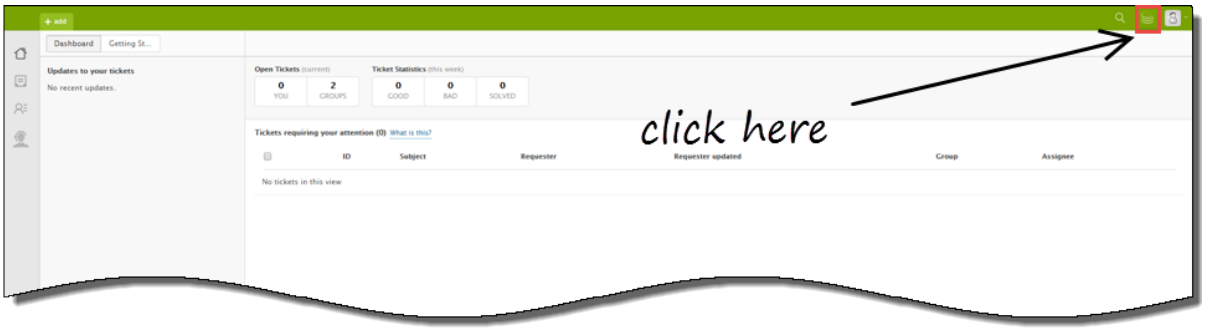
Gplus Adapter for Zendesk

The Gplus Adapter for Zendesk lets you use the Agent Desktop voice features within Zendesk. The Adapter integrates with Zendesk to allow you to get a screen-pop when a call arrives, automatically save notes after calls, and make outbound calls by clicking within Zendesk.

To find information about how to use the Agent Desktop, go to Agent Desktop Help and read the sections on how to work with the voice channel.

For more details on the Zendesk integration features, check out Supported Features.

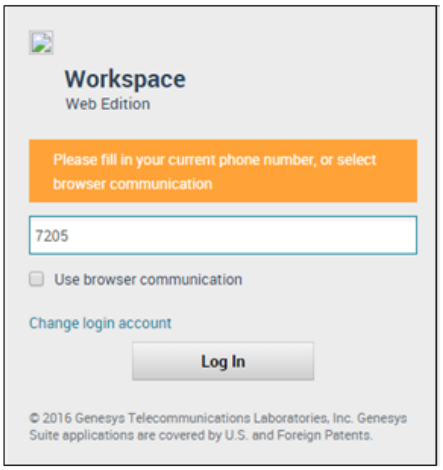
How do I access the Agent Desktop?



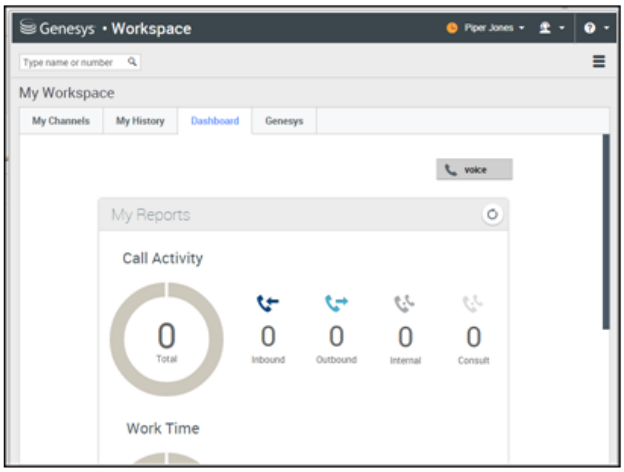
If the Agent Desktop is configured, you will see a **Workspace** icon at the top right corner of your screen.

① login with your credentials

② enter your phone number



③ Agent Desktop opens



After you open the Agent Desktop, you can click the **Workspace** icon to hide and show the Agent Desktop window.

Related Documentation

- For administrators—To integrate the Agent Desktop, see Installing and Configuring the Adapter in Zendesk.
- For agents—To learn how to use the Agent Desktop, see Agent Desktop Help.

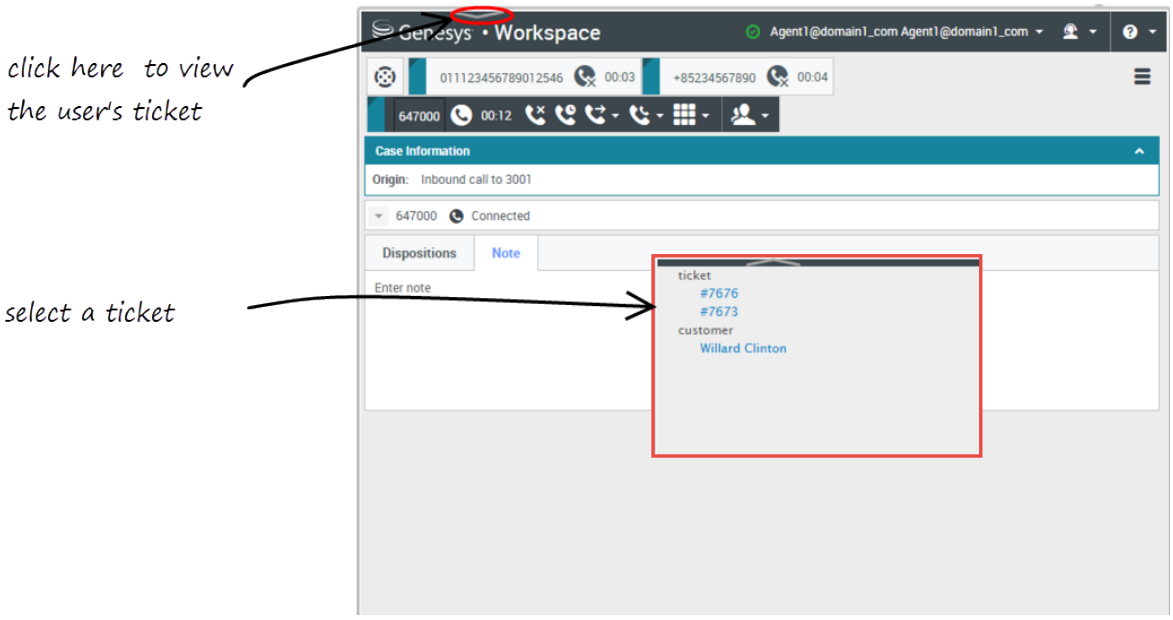
Supported Features

Agent Desktop integrates with Zendesk in the following ways:

Using Click-To-Dial

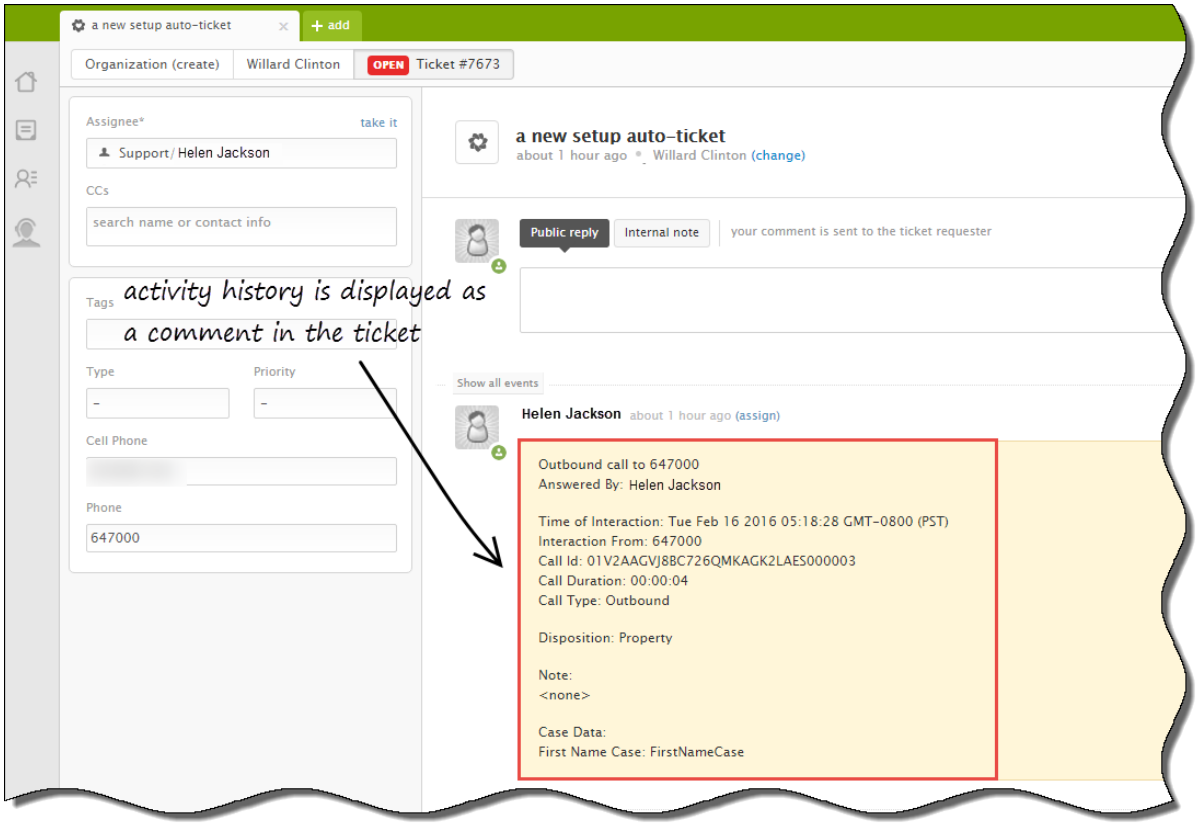
The click-to-dial panel on the right side displays phone numbers that you can dial from the current user or ticket. When you click a number from the list, the Agent Desktop automatically dials it and starts the call.

Screen Pop



When you answer an inbound phone call, the Agent Desktop asks Zendesk to display the related user record or ticket. You have immediate access to the information you need to start working with your customer. If the customer enters their ticket number in the IVR, it displays automatically when you answer the call and you can start the conversation without asking your customer for information that they've already provided.

Activity History



When you mark a voice interaction as done (**Mark Done**), Agent Desktop adds the details about the interaction to the ticket as a comment.

The types of information that are saved in the activity history include:

- call duration
- call type
- case data
- call UUID
- disposition
- notes
- time stamp

Agent Desktop does not save voice calls that could not be established in the ticket. When a

voice call involves multiple parties, such as consultations and conferences, Agent Desktop saves the activity as only one comment.