



Integrator for ZENDESK

Integration Guide

Magento 2 Implementation

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1. Overview

Integrator for Zendesk by OSF Commerce is an extension for Magento 2 that unites Zendesk Support ticket data with Magento e-commerce data. This dynamic two-way integration can greatly improve the relationship between your brand and customers and empower your Customer Support agents to resolve support tickets faster. With order data and customer information available in one location, support agents can prioritize tickets, see the full picture, and provide fully personalized answers to customers.

2. Integrator for ZENDESK Features

- Single Sign-on between Magento and Zendesk;
- Support tickets are created directly in the Magento store by customers and by support agents;
- Relevant support tickets are displayed on both order and customer dashboards;
- Contact Us requests are redirected to Zendesk;
- The Zendesk Embeddables Web Widget can be added to the Magento store.

3. How to install Integrator for ZENDESK

Please follow these steps to install Integrator for ZENDESK:

1. Unzip the extension into a temporary location.
2. Copy the extension into the app/code folder.
3. Log on to the Magento server as (or switch to) a user who has permissions to write to the Magento file system.
4. Run `magento setup:upgrade` command.

4. How to disable Integrator for ZENDESK

Please follow these steps to disable Integrator for ZENDESK:

1. Log on to the Magento server as (or switch to) a user who has permissions to write to the Magento file system.
2. Run `magento module:disable Osf_Zendesk`.
3. Refresh cache.

5. How to uninstall Integrator for ZENDESK

Integrator for ZENDESK should be uninstalled only if you are certain that you will not use it. If you are going to use it eventually, but want to temporarily disable it, opt for disabling it rather than uninstalling it completely.

In case you decide to uninstall the extension forever, follow these steps:

1. Log on to the Magento server as (or switch to) a user who has permissions to write to the Magento file system.
2. Run `magento module:uninstall Osf_Zendesk`.
3. Refresh cache.

6. How to create a ZENDESK Support Account

A separate account is required for Zendesk which is created separately. To create a Zendesk account follow this [link](#). Additional fees are required for Zendesk. Please consult their pricing plans [here](#). For detailed instructions on setting up your Zendesk account and obtaining a Zendesk Account Token, please visit our [Installation Guide](#).

1. Go to <https://www.zendesk.com/register>.
2. Sign in using one of the suggested methods.
3. After completing the sign-up process, the following screen will appear:



Customize your team

This is where you will access your new account. Make sure to bookmark it once you're inside.

Team name .zendesk.com

 Enter only letters and numbers

Your Zendesk will be hosted in

By clicking "Next" you agree to the Zendesk [Master Subscription Agreement](#) and [Privacy Policy](#).

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4. Enter the desired subdomain and click on "Next."

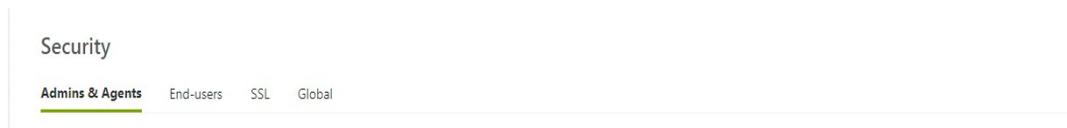
7. How to acquire a ZENDESK Support Account Token

1. Go to your Zendesk subdomain, and then go to Admin > Channels > API.
2. Check the "I agree to the Zendesk Terms of Service" and click on "Get Started."
3. Enable Password Access and Token Access.
4. Click on the plus sign on the right.
5. Click on "Save."

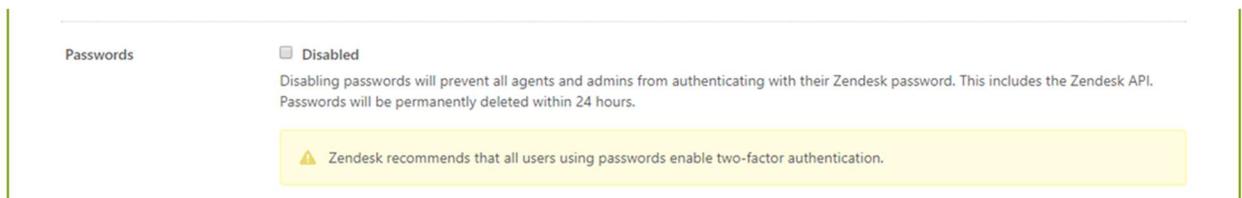
8. How to acquire a ZENDESK Support Single Sign-On Token

Warning! Zendesk allows only one type of Single Sign-On implementation, either for Admins/Agents or End-Users. Please follow these steps to acquire a Zendesk Support Single Sign-On Token:

1. Go to your Zendesk subdomain and then go to Admin > Settings > Security.
2. Select the type of SSO implementation.



3. Select Single Sign-on.
4. Check JSON Web Token.
5. Depending on the SSO implementation chosen:
 - Admins/Agents
 - Remote login URL: https://your_site_base_url/admin_url/zendesk/authenticate.
 - Remote logout URL: https://your_site_base_url/admin_url/zendesk/logout.
 - End-users:
 - Remote login URL: https://your_site_base_url/zendesk/singlesignon/login.
 - Remote logout URL: https://your_site_base_url/zendesk/singlesignon/logout.
6. Click on "Save."



Click "Save" to confirm



9. ZENDESK Pricing

Zendesk offers different pricing plans which can be viewed [here](#).

10. How to set up Integrator for ZENDESK

Please follow these steps to set up Integrator for ZENDESK.

1. Connect to the Zendesk API (required).
 - o Go to the admin backend, and then go to Zendesk > Configuration.
 - o Fill in following fields:

Zendesk Domain
[store view]
yourdomain.zendesk.com

Agent Email Address
[store view]

Agent Token
[store view]
To generate a token, log in to Zendesk then select Manage > Channels > API > Token

- **Zendesk Domain:** Your Zendesk subdomain. If you don't have a Zendesk subdomain, please follow the instructions at **How to create a Zendesk Support Account**.
- **Agent Email Address:** Email used to register the Zendesk Support account.
- **Agent Token:** Follow the instructions at **How to acquire Zendesk Support Account Token**.

2. Associate Zendesk end-user IDs with Magento customer IDs (optional).

Use External ID
[store view]
Depending on your Zendesk configuration under "Settings / Security / JSON Web Token / Update of external IDs?"

3. Synchronize Customers (optional).

Synchronize Customers
[store view]
Synchronize magento customer accounts with zendesk end-users?

Sync All Customers And Create User Fields
Only if customers synchronization is enabled

- Synchronize Customers: Automatically creates a new Zendesk end-user when a customer has logged in or registered.
- Sync All Customers and Create User Fields: Creates Zendesk end-users for all existing customers.

4. Single Sign-On for Admins/Agents (optional).

By default, your administrators and agents are authenticated and signed in using Zendesk’s user authentication. Enabling this setting allows administrators to bypass the Zendesk authentication.

Single Sign-on Enabled 
[store view]

Remote Authentication Token
[store view]

5. Single Sign-On for End-users (optional).

By default, your end-users are authenticated and signed in using Zendesk’s user authentication. Enabling this setting allows end-users to bypass the Zendesk authentication.

Single Sign-on Enabled 
[store view]

Remote Authentication Token
[store view]

New Ticket Link
[store view]
https://yourdomain.zendesk.com/requests/new will be used by default

6. Customer Front-end (optional).

- Create support tickets from the Contact Us form.

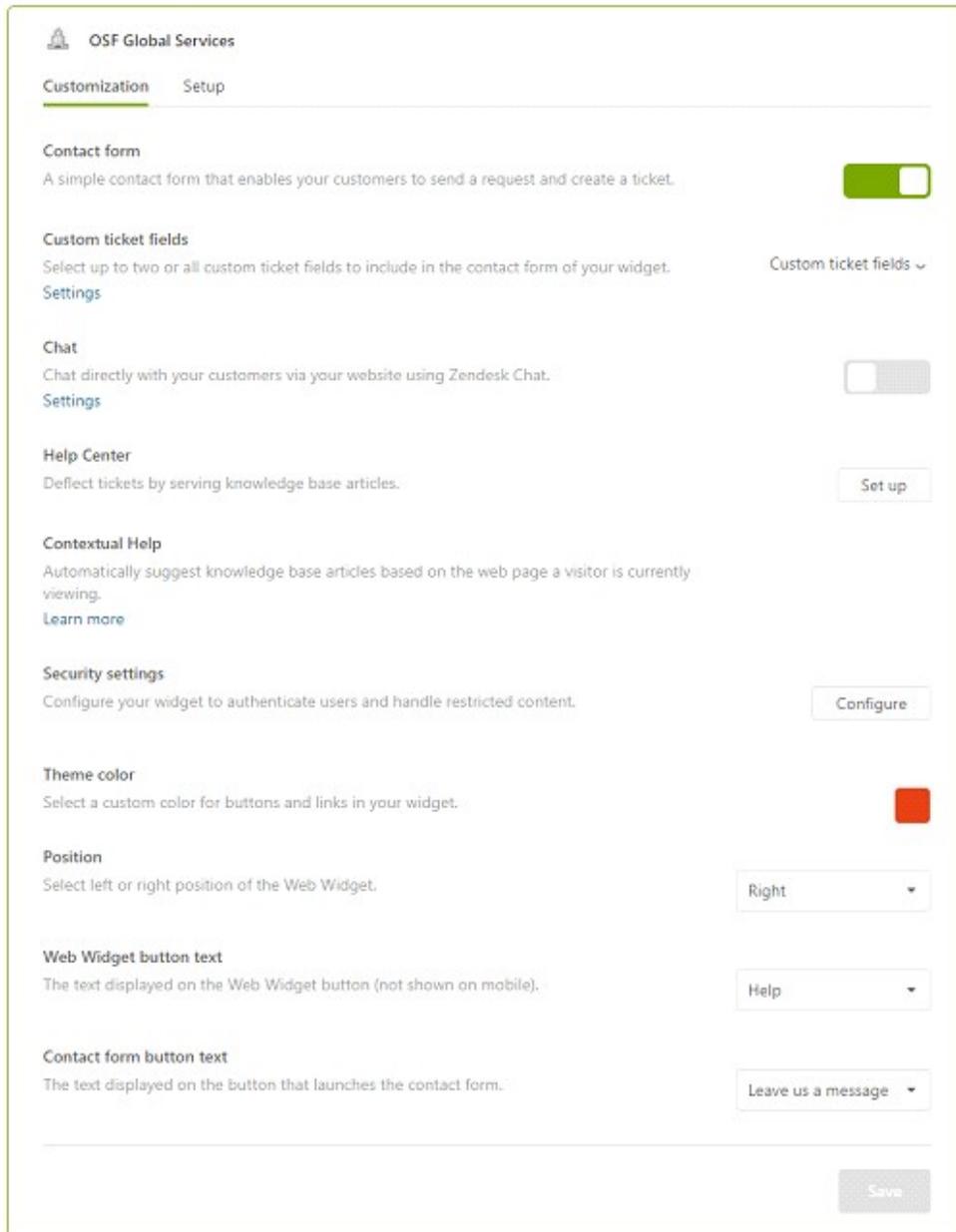
Create tickets from Contact Us form 
[store view]

- Add the Embeddable Web Widget to your site:

- Click on Customize Web Widget.
- You should see an image that looks like the following one:

Widget

The Web Widget makes it easy for your customers to get the help they need, wherever they are on your website, with one click or tap.
[Learn more](#)



The screenshot shows the 'OSF Global Services' customization interface. It has two tabs: 'Customization' (active) and 'Setup'. The interface lists several settings:

- Contact form:** A simple contact form that enables your customers to send a request and create a ticket.
- Custom ticket fields:** Select up to two or all custom ticket fields to include in the contact form of your widget. [Settings](#) Custom ticket fields ▾
- Chat:** Chat directly with your customers via your website using Zendesk Chat. [Settings](#)
- Help Center:** Deflect tickets by serving knowledge base articles. [Set up](#)
- Contextual Help:** Automatically suggest knowledge base articles based on the web page a visitor is currently viewing. [Learn more](#)
- Security settings:** Configure your widget to authenticate users and handle restricted content. [Configure](#)
- Theme color:** Select a custom color for buttons and links in your widget.
- Position:** Select left or right position of the Web Widget.
- Web Widget button text:** The text displayed on the Web Widget button (not shown on mobile).
- Contact form button text:** The text displayed on the button that launches the contact form.

A [Save](#) button is located at the bottom right of the form.

- After configuring the widget, click on “Save.”

- Copy the generated code to the text area.
- Set Include Web Widget to Yes.

Include Web Widget [store view] ▼

Customize Web Widget [Customize Web Widget](#)

Web Widget Code [store view]

- Show Tickets in Customer Accounts

Show Tickets in Customer Accounts [store view] ▼