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Where Customer Interaction Management is as simple as a handshake.



Document – Zendesk & Ameyo Integration

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1. EXECUTIVE SUMMARY

This document illustrates the Integration approach for Zendesk along with Ameyo APIs. The document assumes the basic knowledge of telephony and CRMs and an idea of Ameyo user interface.

It is intended to be used by the technical team of the customers, partners or system integrators to gain an in-depth knowledge of the integration process.



2. ABOUT DRISHTI

Drishti-Soft is an innovator of Contact Center Software and Enterprise Communications Applications. Working in the domain of customer interactions management solutions, Drishti has consistently delivered futuristic applications to un-complicate communications. Call center solutions from Drishti is powering millions of inbound, outbound and blended interactions across the globe.

With over 11 years of experience in the challenging and fast-paced ICT (Information Communication Technology) domain, Drishti's product portfolio includes patent-pending development platform and technology. Drishti offers such Communications Solutions that empowers enterprises to dynamically manage Business Processes, Interactions, Workforce and Service Levels on emerging Unified Communications (IP Telephony, Unified Messaging, Conferencing, Presence Management, and Application Collaboration), SOA (Service Oriented Architecture), and SaaS (Software as a service).

Distributed across seven offices in two countries, Drishti's expert workforce comprises of more than 200 individuals across R&D, Sales & Marketing, Engineering, and Support units. Headquartered at Gurgaon, India, Drishti has multiple regional offices in India (New Delhi, Mumbai, Bangalore, Kolkata, Chennai) & Philippines. Drishti Philippines Inc., a wholly owned subsidiary of Drishti India, was established in Sep. 2006. Apart from this, Drishti has a vast network of partners and resellers spread across India, Zimbabwe, Indonesia, Vietnam, Bangladesh, Malaysia, Middle East, Nigeria and Kenya.

2.1 DRISHTI'S OVERVIEW

- 12 + years into existence
- First to have IP based Contact center solution
- Powering communications for over 1500+ clients globally.
- Diverse industry experience & incredible Customer Satisfaction
- 200+ strong workforce majorly from IIT's, NIT's
- Presence across 40 countries (APAC, AFRICA, MEA, Europe).
- Significant player in the APAC region market share of ~9% in IP Agent shipments in 2013
- >80% of customer interactions in Indian e-commerce happens on Ameyo Platform
- Marquee customers across end user industries BFSI, BPO, e-commerce, Travel, Logistics and more
- Track record of winning against Global biggies in India as well as overseas
- Revenue CAGR of 38% from FY10 to FY14, Financially Stable
- 350+ Man Years of R&D effort to build the platform, Commitment to continuous innovation
- 65+ Channel Partners across 40+ countries
- Experienced Leadership Team with expertise in Technology

2.2 WHAT WE DO

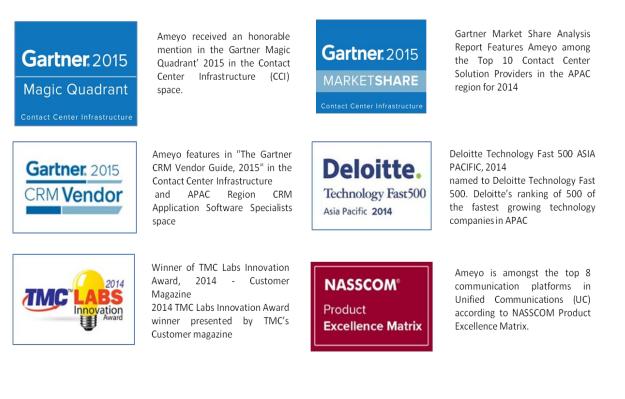
- We manage CUSTOMER INTERACTIONS
- We build CUSTOMER EXPERIENCE
- We streamline BUSSINESS PROCESSES
- We adapt to changing BUSINESS NEEDS

Solutions are provided to different verticals:



2.3 AWARDS & RECOGNITION

We have implemented innovative and intelligent solutions enhancing business process efficiencies, improving customer experience and reducing total cost of ownership for our Clients. Our robust technologies and dedicated support have won numerous awards worldwide including:





3. AMEYO ZENDESK INTEGRATION

Ameyo integration with Zendesk tightly weaves the functionality of both applications to improve responsiveness, efficiency and management of customer experience. Through this integration, businesses can radically improve customer service, case management, customer relationships by:

• Instantly Responding to Customer Requests

Ameyo allows for a customer's information to be automatically displayed during inbound or outbound interactions, providing representatives with complete information on existing request and history of prior service requests. With Ameyo Engage intelligent routing capability, customers (callers) can be routed to appropriate reps based on the nature of customer request.

The platform is configured to implement an IVR system to provide customers with contextual self-service options and, when requiring human assistance, the call will be routed to the concerned rep, eliminating transfers and improving overall customer experience.

• Controlling Customer Conversations from a Single Screen

Representatives are provided with an integrated Ameyo and Zendesk single screen environment allowing them to create and update tickets on Zendesk. Through API integrations, representatives can take actions in Zendesk without leaving the Ameyo interface. This streamlined process will save your representative time so they can focus on your customers.

• Enabling Personalized Representatives Responses

Ameyo can enable preferred Agent routing capability that can route customer calls to representatives who are handling the requests (tickets) of the customer creating a seamless workflow of reps. Prior to answering the call, the rep is armed with every piece of information he needs to handle the call.

• Providing 24*7 Customer Support

If customers call after office hours a ticket can be automatically generated in the system. These tickets would be stacked in the database on priority to be called back.



4. SCOPE OF AMEYO ZENDESK INTEGRATION

In a typical enterprise deployment, Ameyo and third party enterprise systems like CRM etc needs to interoperate and integrate to actualize business value for the customer. Ameyo philosophy for third party integration is based on service oriented architecture where in all the functionalities provided by the system is exposed as services and other services can discover and use the services it is interested in. For instance a CRM system would be interested in the customer information (phone number, caller-id, digits pressed etc) whereas another system might be interested in the presence status of the users.

Ameyo provides a host of options to integrate with third party enterprise applications including ERPs, CRMs, HRMs, CMSs, etc. These approaches vary in the implementation complexity and flexibility they bring. This section explains in detail about these approaches including the platform requirements, assumptions and a quick overview of API.

4.1 URL BASED INTEGRATION

Pre-requisites

Applications having browser based interface can be invoked by calling a URL.

Approach

URL based integration is the simplest integration approach that can be used to integrate with applications having browser based interface. Ameyo invokes the enterprise system by specifying the relevant URL at various pre-defined stages of communication with all the relevant parameters needed by the enterprise application.

4.2 SSO (SINGLE SIGN ON)

Representatives are provided with an integrated Ameyo and Zendesk single screen environment allowing them to work on Ameyo and Zendesk simultaneously.

4.3 IVR SCOPE

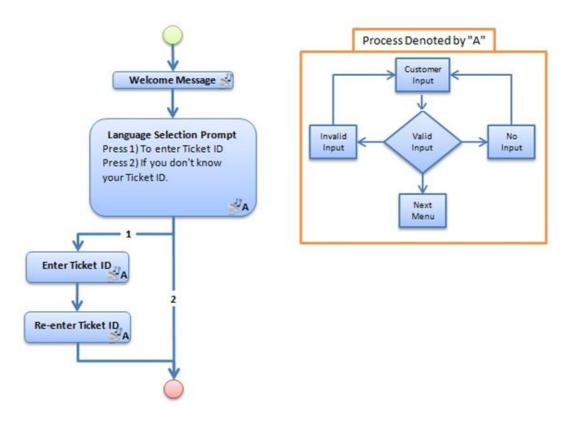
For an inbound call an IVR shall be played giving two options-

- CASE 1: Customer knows the ticket ID
- CASE 2: Customer doesn't know the ticket ID

CASE 1:- In case the customer knows the ticket ID, s/he is asked to input the ticket id through DTMF and the CRM page corresponding to the provided ticket ID opens.

CASE 2:- In case the customer doesn't know the ticket ID, the system searches the contact basis on the phone number and populates the information if the contact exists in Zendesk otherwise if in case the contact is not found, the CRM page shall be popped up from where

the agent can search the ticket according to various filters provided by Zendesk. Also, Agent can create a new user in case the contact does not exist.



5. INBOUND INTERACTION FLOW

Calls flows into Ameyo Solution and are offered to agents in available state. The call flow varies based on the search type and search results.

- 1. User can login into Ameyo and he would be logged in into Zendesk through the single sign on Integration.
- 2. User can select the campaign and can map the appropriate extension.
- 3. Once user is logged in, make sure that status is changed to "Available" so that agent can make or receive calls.
- 4. When a customer calls, system will search the contact basis on phone number.
- 5. Now, when an existing customer calls, agent can see previous tickets associated with that particular customer.
- 6. Make sure to dispose the call by clicking on the Force dispose button to continue taking calls.

5.1 IDENTIFYING A USER BASED ON A PHONE NUMBER

When an agent receives a call, the telephone system can check to see if there's a Zendesk user associated with the caller's phone number. This is done by using the users search API to look for a user with the same phone number.

Note: The phone number format used in the search has to match the format stored in Zendesk.

5.2 CREATING A USER IF THE NUMBER IS NOT RECOGNIZED

If the caller's phone number is not found in Zendesk, the agent can create a user. The agent can then get more information from the user when on the call, such as their name and email address.

5.3 INTEGRATION TOUCHPOINTS

To enable fine grained integration, it exposes the state of the system through a series of events and accepts events from the external system at various integration points. Ameyo currently supports following communication stages:

Agent Login: The first integration point is invoked when the agent login into the system and selects a particular campaign to work in. This integration point can be used for Single Sign on functionality through which agent can login into Ameyo and Zendesk simultaneously.

Agent Call Handling: This integration point is invoked when an agent handles a call (inbound/manual dial/callback etc). It contains information pertaining to agent, customer, call (telephony specific) etc.

5.3.1 AGENT LOGIN (SINGLE SIGN ON)

When the user login in Ameyo application using Ameyo Client application, an authentication request will be sent to the CRM using the login API shared by the 3rd party CRM. In case of a successful attempt, data CRM session Id and other parameters will be received as response. For any failure, CRM will return "FAILURE" in status parameter as per specification.

5.3.2 AGENT CALL HANDLING

Agent can be associated with a customer in number of ways, namely:

- 1. **Incoming call**: As part of an Inbound campaign, agent receives a call through ACD (Automatic Call Distribution system)
- 2. **Auto Dial**: As part of an outbound campaign, agent receives an automated predictive dialing or progressive dialing call
- 3. Manual Dial: Agent dials a call from the user interface
- 4. **Preview Dial**: Agent previews a customer before dialing either as part of a preview dialing campaign or via screen
- 5. **Callback Dial**: Agent receives a callback scheduled in past.

In all of the above cases (known as customer connect), agent needs to view the customer Information and possibly update the same. Ameyo invokes the Zendesk CRM with all call related and customer information. While in call the agent can update and navigate through multiple pages in Zendesk CRM.

6. CONFIGURATION STEPS

For Integration of Zendesk with Ameyo, Following keys need to get from Zendesk for Authentication:-

- 1. Secret Key (Used For Single Sign on)
- 2. API Token (Used when API is called)

6.1 CONFIGURATION UNDER ZENDESK APPLICATION

STEP 1:- ENABLE REST API TOKEN ACCESS

- 1. Login with admin account
- 2. Go to Settings -> API
- 3. Enable Token Access
- 4. Note down the API token

	L texozen@gmail.com × + add	ୟ <mark>ଥ</mark>						
	Sandbox							
Û		Channels / API						
Ξ	CHANNELS	You can use the Zendesk API to access Zendesk functionality, such as creating, editing, and deleting tickets. You can integrate Zendesk features in your own applications or build apps to add functionality to your Zendesk.						
8:	Email	Your use and access to the API is expressly conditioned on your compliance with the policies, restrictions and other provisions related to the API						
	Twitter	set forth in our API Restrictions and Responsibilities and the other documentation we provide you. You must also comply with the restrictions set forth in the Zendesk Terms and Conditions and the Zendesk Privacy Policy, in all uses of the API. If Zendesk believes that you have or attempted						
	Chat	to violate any term, condition or the spirit of these policies or agreements, your right to access and use the API may be temporarily or permanently revoked.						
	Facebook	Learn more						
	Voice	Settings OAuth Clients						
	Widget New							
2	API	Token Access 3 🗷 Enabled						
	Mobile SDK new	Enable REST API using tokens. If you use the API token rather than a password, use basic authentication and add hoken to the email login when authenticating a user. Example:						
		curl -u texozen@ymail.com/token:YOUR_TOKEN https://texozen.zendesk.com/api/v2/users/me.json						
	C BUSINESS RULES	Learn more.						
	Triggers							
	Automations	add new token						
8	Service Level Agreements NEW	Active API tokens (1) add new token						
٥	g	4 XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX						
010	+ 057711100							
<u> </u>	¢ SETTINGS	Password Access 🖉 Enabled						
¢	Account	Enable REST API access using the email address and password for the authentication 2 API						

STEP 2:- ENABLE SSO (Single Sign On) AND GET SECRET KEY

- 1. Go to Settings -> Security
- 2. Enable Single Sign On (SSO)



	texozen@gmail.com × + add	م ٩	8
۲ E	API Mobile SDK new	Admins & Agents End-users Global	
8:	G BUSINESS RULES Triggers Automations	Administrator and agent sign-in authentication By default, your administrators and agents are authenticated and signed in using Zendesk's user authentication. You can however bypass this ar require your administrators and agents to sign in using Google or a single sign-on solution using JWT or SAML (available in Plus and Enterprise)	
	Service Level Agreements new	C Zendesk Admins and agents sign in with their Zendesk accounts.	
2	Account Subscription Security Schedule	Admins and agents use Google authentication to sign in to your Zendesk.	
٩	Tickets Agents Customers	Admins and agents use your SSO service to sign in to your Zendesk. Requires configuration. SAML SAML SAML is an industry standard SSO framework typically used by large enterprises for communicating identities across the internet. Learn more.	
ılı ¢	Benchmark Survey Extensions	JSON Web Token JWT, a widely adopted open standard, provides a flexible framework for creating a custom SSO solution. Learn more.	

- 3. Under SSO check json web token
- 4. Update remote login url
- 5. Note down the shared secret key

Facebook	JSON Web Token JWT, a widely adopted open standard, provides a flexible framework for creating a custom SSO solution. Learn more.
Voice Widget now API	Remote login URL* http://login.texo.cc.8888/texowebaccess/
Mobile SDK new	This is the URL that Zendesk will redirect your users to for remote authentication, e.g. https://www.example.com/services/login
₿ BUSINESS RULES	Remote logout URL https://
Triggers	This is the URL that Zendesk will redirect your users to after they sign out e.g. https://www.example.com/services/logout
Automations Service Level Agreements new	IP ranges
SETTINGS	Requests from these IP ranges will always be routed via remote authentication. Requests from IP addresses outside these ranges will be routed to the normal sign-in form. To route all requests through remote authentication, leave this blank. An IP range is in the format n. n. n., where n is a number or an asterisk V/ wild card. Separate multiple IP ranges with a space. Your current IP address is. 119. 82. 68. 154
Account Subscription	Update of external IDs? Off •
Security Schedule	It is safe to ignore this setting if you do not use external_id's. When checked, the external_id of the user being signed in can be updated. This only happens when no user with the external_id was found, but the user's email address was. The external id with the respectively the external id with the respectively.
Tickets Agents	external_id is unique for an account Users without an external_id will have one added if it's present in the authentication request.
Customers	Shared secret For security reasons, we only display the first 6 characters of your existing remote authentication token here: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX



6.2 CONFIGURATION UNDER AMEYO

6.2.1 INSTALL MODULE UNDER ZENDESK

This will be handled by Drishti Team; it will be one time activity in which Drishti will install basic configuration files under Ameyo for integration.

6.2.2 UPDATE KNOWLEDGE BASE, CRM AND PREVIEW URL

Step 1:- Login with Administrator

Step 2:- Set Knowledge Base URL

http://<Ameyo-server-App-IP>:8786/zendesk/sso.php

Step 3:- Set CRM & preview URL

http://<Ameyo-server-App-IP>:8786/zendesk/redirect.php

6.2.3 CONFIGURE ZENDESK INFORMATION FROM CONFIGURATION MODULE

For future scope, Ameyo is planning to provide five(5) configuration options in Ameyo ACP Module wherein the user can enter the following details of configuration for Zendesk Integration:-

- 1. Secret Key
- 2. Zendesk Domain
- 3. App Server Domain
- 4. API Key
- 5. CURL Timeout (Maximum time for API Response can be set)

			🙎 Login as admin	Cogout
Reports Configuration System Administration IT Administration System				
CONFIGURING ZENDESK INFORMATION				A
	CAMPAIGN NAME			
	SECRET KEY			
	ZENDESK DOMAIN		4	
	APP SERVER DOMAIN			
	API KEY			
	CURL TIMEOUT			
		ADD		
				v



7. APPENDIX

7.1 SCREENSHOTS (AGENT INTERFACE)

Ameyo provides agents with web based clients. A screenshot of agent screen has been shown below in which integration with Basic Zendesk CRM has been done.

				⊍ Logout		🔁	Autocall	Available	\sim
IE CRM	Duration: 2 min 3 sec	Last Activity Since 1 min 27 sec	Campaign inbound	Chat Id	Customer 901<901>	Chat Status:		Welcome agent	Action
🗘 test 🛛 🗙 🕂 add								8-	V.
Drishti-soft agent OPEN Incident #2								Apps	Han
Assignee*	\$	test Monday 10:15 • age	nt < shushantrotn	nara@drishti.soft.cor	n> via shushant (cha	(and		•	Tran
CCs) monday 10.15 = age	nt santanangour	nare@unantraoi.com	ire via andanani (dia	nge)			Han Cust
	8	Public reply Inter	nal note your	r comment is sent to th	e ticket requester				Con
Type Priority Incident Low		1		k					Han Con
Link incident to problem								Attach file	For
Tags	Show a								Dial N
fasdfads ×	8	shushant Monday 10 sfasdfasdfzxcxvefag							e
									Other

Screenshot: Ticket details populated on the basis of Ticket ID entered by Customer

🕑 DRIS	HTI	Р	references		🕖 Logout	/	e 5	Nutocall Availabl		î
Home	СКМ	Duration: 2 min 31 sec	Last Activity Since 1 min 55 sec	Campaign inbound	Chat Id	Customer 901<901>	Chat Status:		Welcome	
									agent Actions 🗧	
	🗢 test 🛛 × 🕇 add								8 Hold	
	Search								Hangup Self	
_	Everything							Show search tips		
E	Tickets								Transfer	
8:	People								Hangup Customer	
Q	Organizations								Hangup Customer	
Q				k					Confer	
	Any time								5	
	Past day								Hangup Confer	
	Past week Past month								Force Dispose	
	Past year									
	÷								Dial No. 🛛 🖉	
									0	
									s a	
٢										
000									Other No.8	1
Terminal Inf	io; 127.0.0.1 Status: connected Customer Status	connected Over	e Name: inhound 2 DID:	133123 Char	nnel Info: softpho	n o1		user-readyCommand Sent.	Alternate C2014 Drishti-Soft Solutions	

Screenshot: Agent Interface with Zendesk Search Interface to search Ticket Details

