

**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:



Ameyo received an honorable mention in the Gartner Magic Quadrant' 2015 in the Contact Center Infrastructure (CCI) space.



Gartner Market Share Analysis Report Features Ameyo among the Top 10 Contact Center Solution Providers in the APAC region for 2014



Ameyo features in "The Gartner CRM Vendor Guide, 2015" in the Contact Center Infrastructure and APAC Region CRM Application Software Specialists space



Deloitte Technology Fast 500 ASIA PACIFIC, 2014
named to Deloitte Technology Fast 500. Deloitte's ranking of 500 of the fastest growing technology companies in APAC



Winner of TMC Labs Innovation Award, 2014 - Customer Magazine
2014 TMC Labs Innovation Award winner presented by TMC's Customer magazine



Ameyo is amongst the top 8 communication platforms in Unified Communications (UC) according to NASSCOM Product Excellence Matrix.

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

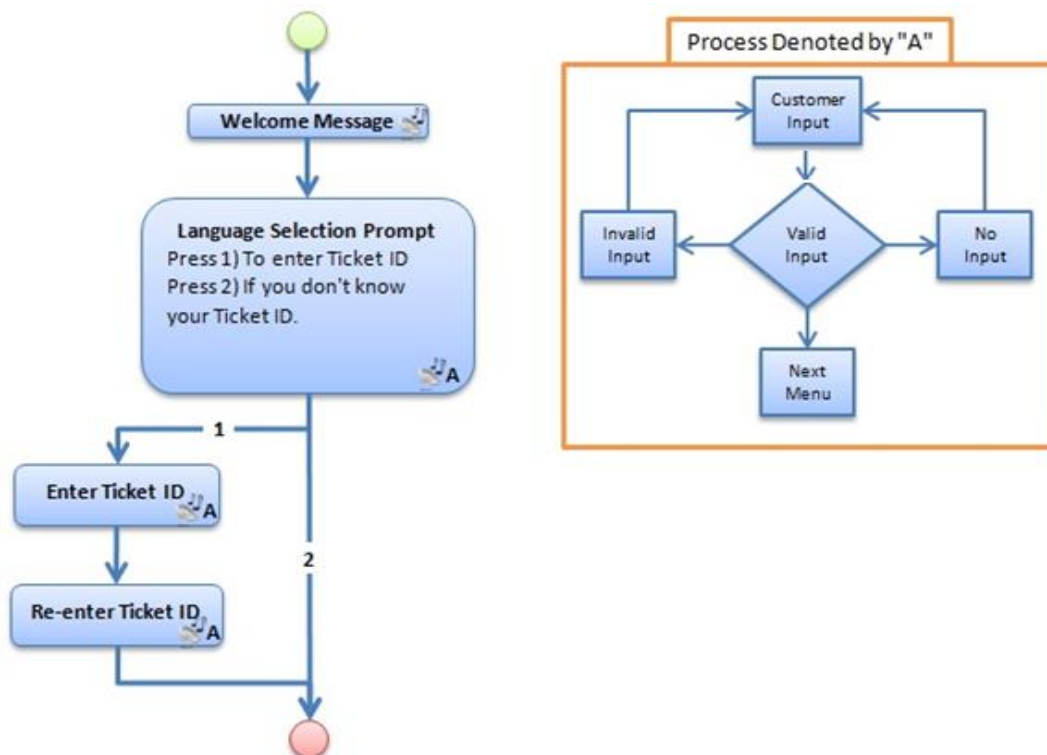
For an inbound call an IVR shall be played giving two options-

- 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.

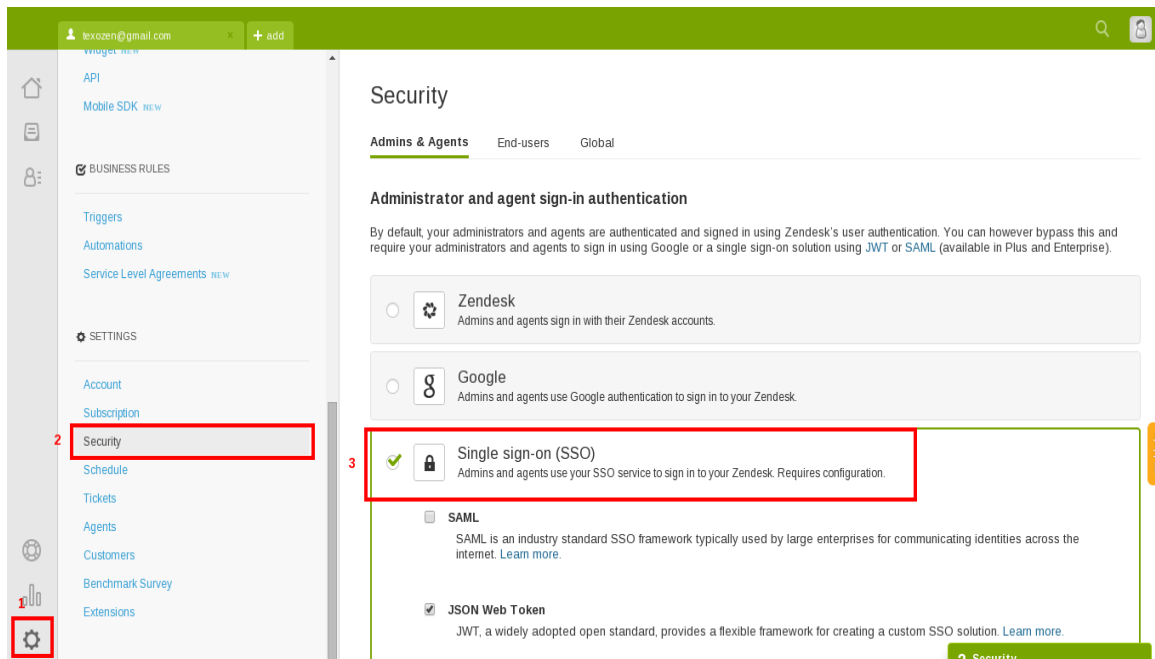
In all of the above cases (known as customer connect), agent needs to view the customer Information and possibly update the same. Ameyo invokes the Zendesk CRM with all call related and customer information. While in call the agent can update and navigate through multiple pages in Zendesk CRM.

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

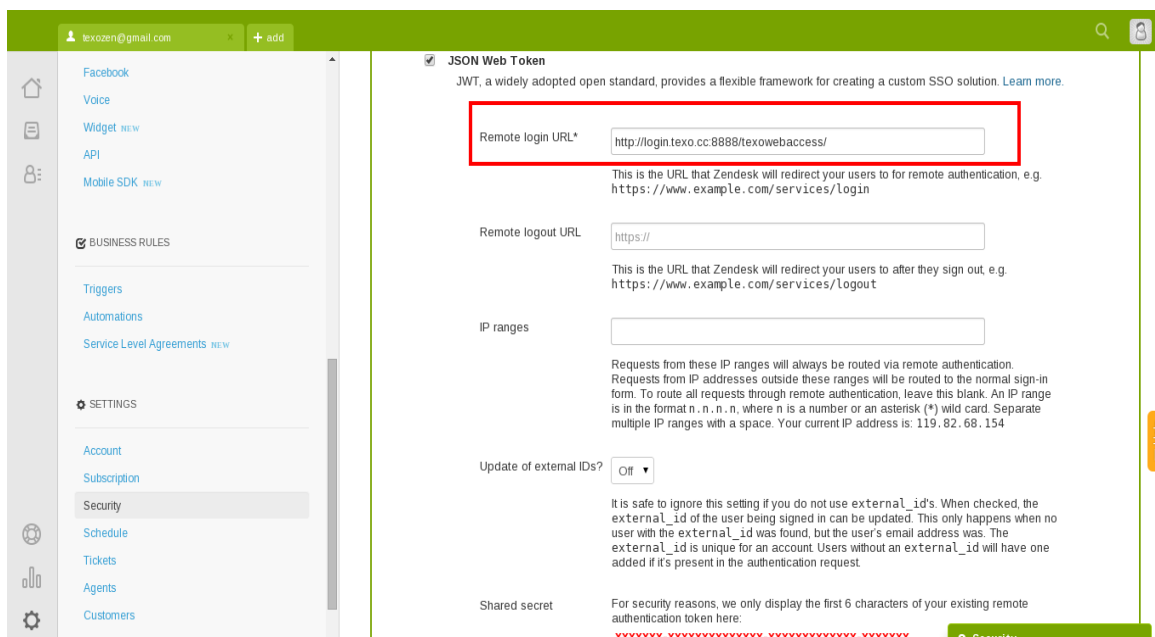
STEP 1:- ENABLE REST API TOKEN ACCESS

-
- The screenshot displays the Zendesk Admin Center interface. On the left sidebar, the 'API' link under the 'CHANNELS' section is highlighted with a red box and labeled '2'. The 'SETTINGS' link at the bottom of the sidebar is also highlighted with a red box and labeled '1'. The main content area is titled 'Channels / API'. It contains a paragraph explaining the use of the Zendesk API, a 'Learn more' link, and a 'Token Access' section. In the 'Token Access' section, a toggle switch labeled 'Enabled' is highlighted with a red box and labeled '3'. Below this, there is a list of 'Active API tokens (1)'. The table shows one token with an ID highlighted by a red box and labeled '4', a last used time of 'Last used more than 60 minutes ago', and a name 'token'. The bottom of the page shows 'Password Access' with a toggle switch labeled 'Enabled'.

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



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



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>

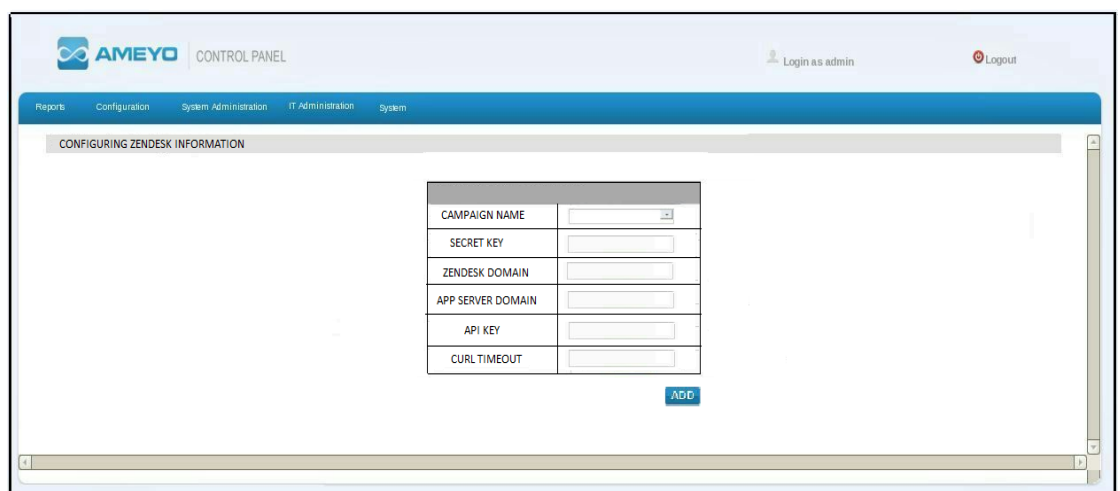
Step 3:- Set CRM & preview URL

➤ <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)



The screenshot displays the Ameyo Control Panel interface. At the top, there is a navigation bar with the Ameyo logo and the text 'CONTROL PANEL'. Below this, a secondary navigation bar contains links for 'Reports', 'Configuration', 'System Administration', 'IT Administration', and 'System'. The main content area is titled 'CONFIGURING ZENDESK INFORMATION' and contains a form with the following fields:

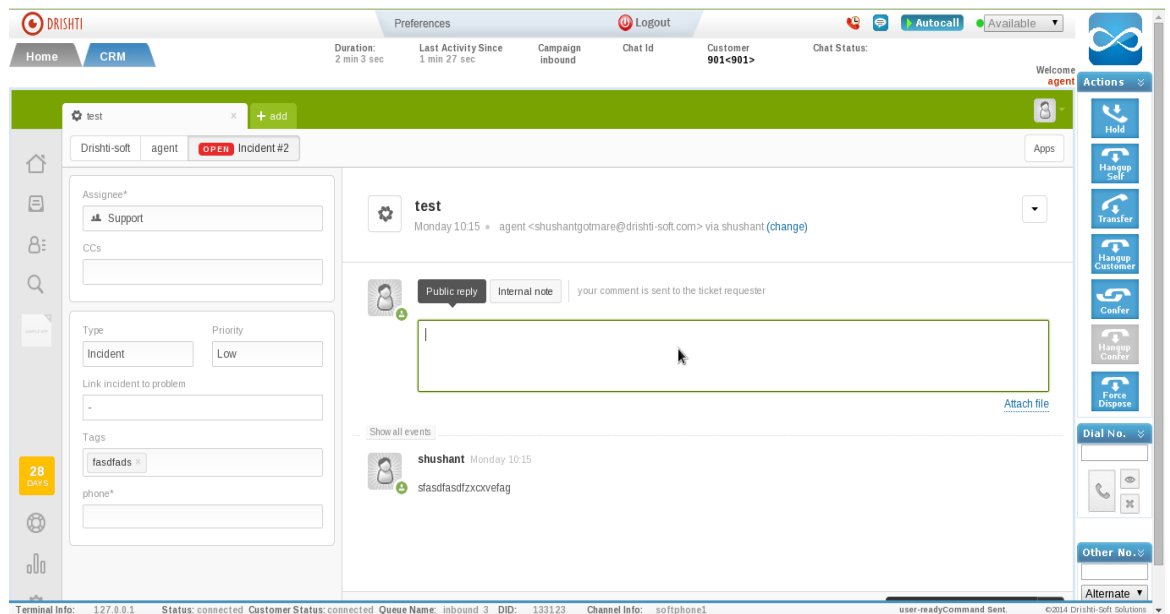
CAMPAIGN NAME	<input type="text"/>
SECRET KEY	<input type="text"/>
ZENDESK DOMAIN	<input type="text"/>
APP SERVER DOMAIN	<input type="text"/>
API KEY	<input type="text"/>
CURL TIMEOUT	<input type="text"/>

Below the form, there is a blue 'ADD' button.

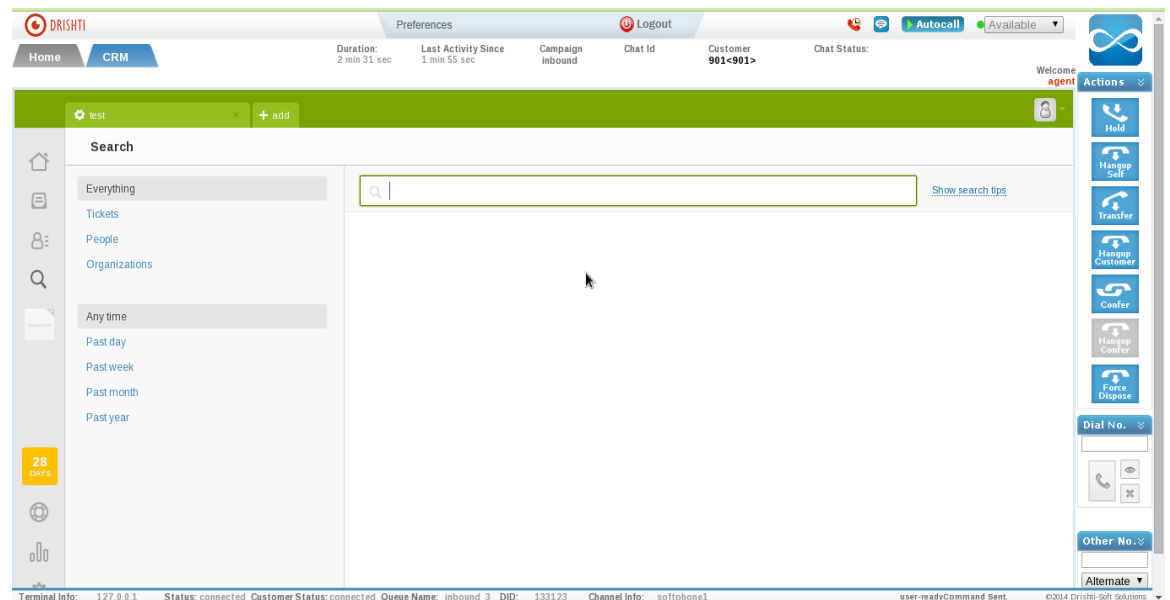
7. APPENDIX

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.



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



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