



Getting Started with Cisco Webex Contact Center for Zendesk

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Preface

- [Change History, on page iii](#)
- [About this Guide, on page iii](#)
- [Audience, on page iii](#)
- [Conventions, on page iii](#)
- [Communications, Services, and Additional Information, on page iv](#)
- [Documentation Feedback, on page v](#)

Change History

This table lists changes made to this guide. Most recent changes appear at the top.

Change	Date
Initial Release of Document	July 2019

About this Guide

The Getting Started with Cisco Webex Contact Center for Zendesk guide describes how to integrate Cisco Webex Contact Center into Zendesk. This guide also describes how to configure the Cisco Webex Contact Center client and make inbound and outbound calls.

Audience

Intended for Cisco Webex Contact Center users who use Zendesk.

Conventions

This guide uses the following conventions.

Convention	Description
boldface font	<p>Boldface font is used to indicate commands, such as user entries, keys, buttons, and folder and submenu names. For example:</p> <ul style="list-style-type: none"> • Choose Edit > Find • Click Finish.
<i>italic</i> font	<p>Italic font is used to indicate the following:</p> <ul style="list-style-type: none"> • To introduce a new term. Example: A <i>skill group</i> is a collection of agents who share similar skills. • For emphasis. Example: <i>Do not</i> use the numerical naming convention. • An argument for which you must supply values. Example: IF (<i>condition, true-value, false-value</i>) • A book title. Example: See the <i>Cisco Webex Contact Center Getting Started Guide</i>.
window font	<p>Window font, such as Courier, is used for the following:</p> <ul style="list-style-type: none"> • Text as it appears in code or information that the system displays. Example: <code><html><title> Cisco Systems, Inc. </title></html></code> • File names. Example: <code>tserver.properties.</code> • Directory paths. Example: <code>C:\Program Files\Adobe</code>

Communications, Services, and Additional Information

- To receive timely, relevant information from Cisco, sign up at [Cisco Profile Manager](#).
- To get the business impact you're looking for with the technologies that matter, visit [Cisco Services](#).
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[Cisco Bug Search Tool](#) (BST) is a web-based tool that acts as a gateway to the Cisco bug tracking system that maintains a comprehensive list of defects and vulnerabilities in Cisco products and software. BST provides you with detailed defect information about your products and software.

Documentation Feedback

Provide your comments about this document to: mailto:contactcenterproducts_docfeedback@cisco.com.



CONTENTS

PREFACE

Preface	iii
Change History	iii
About this Guide	iii
Audience	iii
Conventions	iii
Communications, Services, and Additional Information	iv
Documentation Feedback	v

CHAPTER 1

Get Started with Cisco Webex Contact Center for Zendesk	1
Features Supported in Cisco Webex Contact Center for Zendesk	1
Install Cisco Webex Contact Center for Zendesk	1
Uninstall Cisco Webex Contact Center for Zendesk	2

CHAPTER 2

Agent Activity in Cisco Webex Contact Center for Zendesk	3
Receive an Inbound Call in Cisco Webex Contact Center for Zendesk	3
Place an Outbound Call in Cisco Webex Contact Center for Zendesk	4



CHAPTER

1

Get Started with Cisco Webex Contact Center for Zendesk

Cisco Webex Contact Center brings the ability of Cisco's cloud contact center into your Zendesk environment. Cisco Webex Contact Center helps optimize and enhance your digital experience and enable you to deliver contextual, continuous, and capability-rich journeys for your customers.

This guide explains how you can install, configure, and use the different features of Cisco Webex Contact Center for Zendesk.

- [Features Supported in Cisco Webex Contact Center for Zendesk, on page 1](#)
- [Install Cisco Webex Contact Center for Zendesk, on page 1](#)
- [Uninstall Cisco Webex Contact Center for Zendesk, on page 2](#)

Features Supported in Cisco Webex Contact Center for Zendesk

Cisco Webex Contact Center for Zendesk offers the following benefits:

- Allows you to place, answer, and control telephone calls from the Cisco Webex Contact Center for Zendesk client.
- Logs the activity details in the Zendesk ticket after the call ends.
- Retrieves logged-activity details from the Zendesk ticket while interacting with customers.

Install Cisco Webex Contact Center for Zendesk

Before you begin

If you have an older version of Cisco Webex Contact Center for Zendesk App, then uninstall the old version before installing the latest version. For more information, see [Uninstall Cisco Webex Contact Center for Zendesk, on page 2](#).

Procedure

- Step 1** Log in to the Zendesk.

Step 2 Click the **Gear** icon and click **Marketplace** from the navigation pane.

Step 3 Search for **Cisco Webex Contact Center for Zendesk** and click on the **Cisco Webex Contact Center for Zendesk** App and follow the wizard to install.

What to do next

After a successful installation, the **Cisco Webex Contact Center** icon appears next to the Zendesk Chat icon. Click the **Cisco Webex Contact Center** icon and when prompted, sign in and enter **Dial Number (DN)** and **Team** information.



Note

- Enter your DN and Team name for the first time you log in to the Cisco Webex Contact Center for Zendesk client. For subsequent log-in sessions, the same DN and Team name appear in the client automatically.
 - If you are running Zendesk in multiple tabs in your browser window, the Cisco Webex Contact Center client is active in only one tab.
 - You can click the Cisco icon at any time to minimize the client and continue to work in Zendesk.
-

Uninstall Cisco Webex Contact Center for Zendesk

To uninstall the Cisco Webex Contact Center for Zendesk:

Procedure

Step 1 Log in to Zendesk.

Step 2 Click the **Gear** icon from the left navigation pane.

Step 3 Click **Manage**, and then click the **Cisco Webex Contact Center > Uninstall app**.



CHAPTER 2

Agent Activity in Cisco Webex Contact Center for Zendesk

- [Receive an Inbound Call in Cisco Webex Contact Center for Zendesk, on page 3](#)
- [Place an Outbound Call in Cisco Webex Contact Center for Zendesk, on page 4](#)

Receive an Inbound Call in Cisco Webex Contact Center for Zendesk

To access Cisco Webex Contact Center and receive a call:

Procedure

- Step 1** From the toolbar, click the **Cisco Webex Contact Center** icon.
- Step 2** In the client screen, sign in using your credentials.
- Step 3** When an incoming call is assigned, your agent state in the client changes to **Ringin**g. The application searches the user records based on the incoming ANI or phone number and depending on the search results, it does the following:
- If a user record matches and an open ticket is available, it automatically populates the customer information and opens the ticket.
 - If a user record matches and there are many open tickets, it lists all the open tickets. And from the list, you can select the ticket.
 - If a user record matches and there is no open ticket, it opens a new ticket to add information.
 - If a user record does not match and there is no open ticket, it creates a user and opens a ticket to add information.
- Step 4** After the call is disconnected, select a Wrap-Up reason from the drop-down list.
- Note** When you enter Wrap-Up code in the client at the conclusion of a call, it logs the call details in that customer's ticket record.
- Step 5** To see the call information log, click any entry in the incident list. The following details appear:

Table 1: Call Activity Properties

Property	Description
Activity Date / Time	Shows the date and time the call started.
Call Sessionid	Shows the total duration of the call was in the system.
ANI / Phone	Shows the caller's phone number.
Direction	Shows either Inbound or Outbound depends on how the call was initiated.
Queue Name	Shows the queue name.
Wrapup Code	Shows the Wrap-Up code that the agent entered at the conclusion of the call.

Place an Outbound Call in Cisco Webex Contact Center for Zendesk

To place an Outbound Call:

Procedure

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- Step 1** From the toolbar, click the **Cisco Webex Contact Center** icon.
- Step 2** In the Cisco Webex Contact Center screen, sign in using your credentials.
- Step 3** Go to **Home** and select a customer record.
- Step 4** From the list of tickets, click on a ticket to open.
- Step 5** On the right pane, click the **Call** button.
- The system dials the number that is associated with the ticket.
 - When the call is answered, your agent state changes to **Outdial Reserved** in the client and the most recent ticket for the customer you are calling appears in the center panel of the Zendesk window.
- Note**
- If you are running Zendesk in multiple tabs in your browser window, the Cisco Webex Contact Center for Zendesk client is active in only one tab.
 - You can click the Cisco icon at any time to minimize the client and continue to work in Zendesk.
- Step 6** After the call is disconnected, a conversation is logged in to the respective ticket.
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