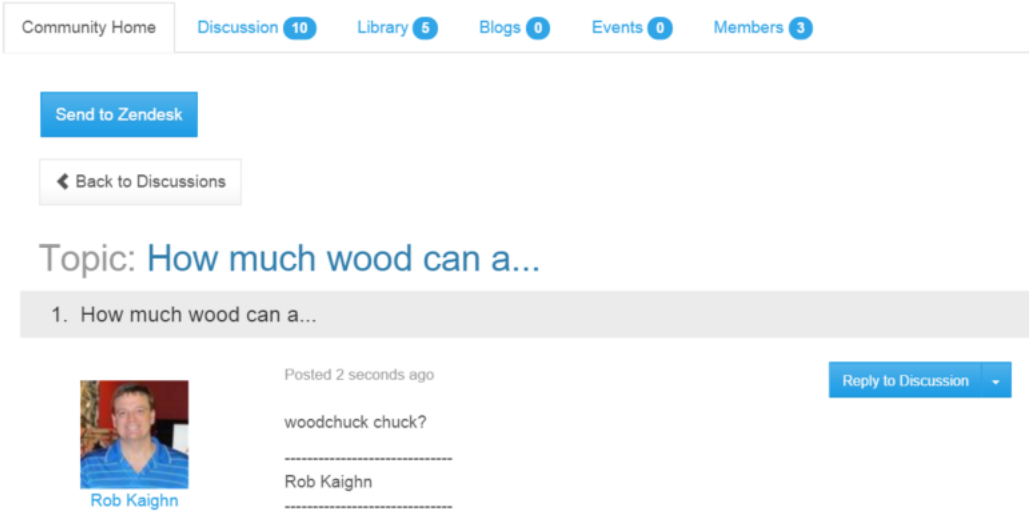
Higher Logic-Zendesk Integration

1. Overview

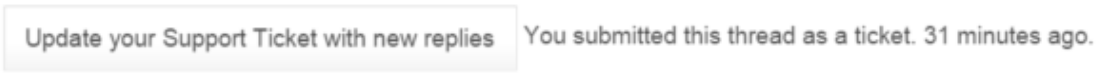
This document details the integration between Higher Logic's Community platform and the Zendesk ticketing platform. The integration allows support tickets to be created in Zendesk from discussion threads in a Higher Logic community. Community discussions can generate significant information around an issue. Using this integration, with the click of a button the full discussion thread is used to create a ticket in Zendesk. This saves the Customer Service Representative (CSR) time because they do not have to track down all the relevant information and people; all that information is transferred to the newly created ticket.

2. Features

The Higher Logic-Zendesk Integration uses a button above the discussion thread to create a ticket in your existing Zendesk ticketing platform (purchased separately). When the button is clicked, the full text of the discussion thread is put into a Zendesk ticket along with links to any attachments. The ticket in Zendesk is from the Higher Logic community user who clicked the button.



After a ticket has been submitted, the user who submitted the ticket no longer is presented with the button to submit a ticket. Instead they see a note that a ticket was submitted and when it was submitted. If additional messages are added to the thread, the user who submitted the ticket will see a button to update the existing ticket with the new messages.



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There are various configurations to control which communities can have tickets submitted from them and which users have permission to submit tickets. Community Types in Higher Logic can be set to allow support tickets to be created from them, and each community of that type needs to be set to allow tickets to be submitted.
Once a community has been configured to allow tickets to be created from its discussion threads, the control on the page can be configured to control which security groups (users) have permission to submit tickets.

3. Integration Details

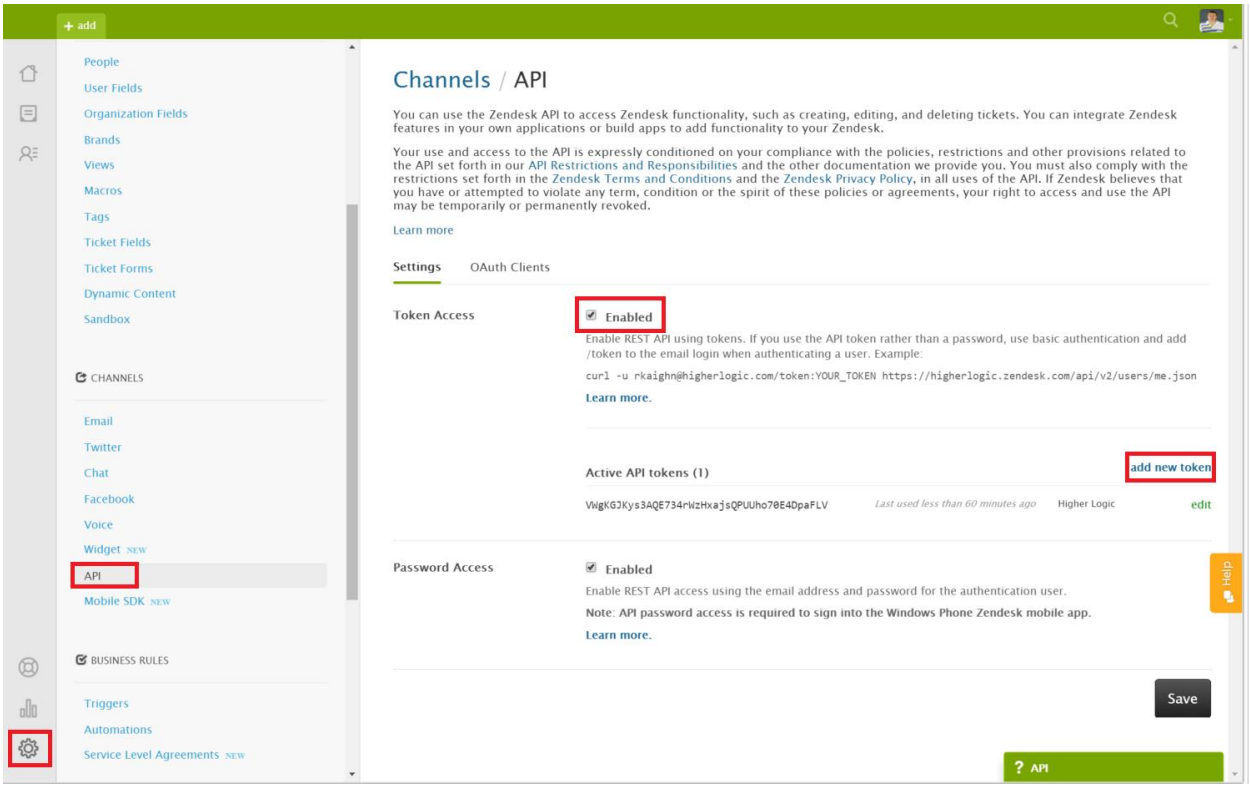
The Higher Logic-Zendesk Integration works with your existing Zendesk ticketing platform and your Higher Logic Community. There are several steps to setting up this integration.

Zendesk API Access

The Higher Logic-Zendesk Integration uses Zendesk REST API tokens to access the Zendesk ticketing platform. You will need to supply Higher Logic with three pieces of information to access Zendesk:

1. The URL for access to you Zendesk API
2. The user that will be used for the integration to access your Zendesk ticketing platform
3. An Active API token

The Zendesk API Token is generated in Zendesk under **Settings**, **API**, **Token Access**. Make sure it is **Enabled** and click the ***add new token*** link to generate a token for the integration to use.

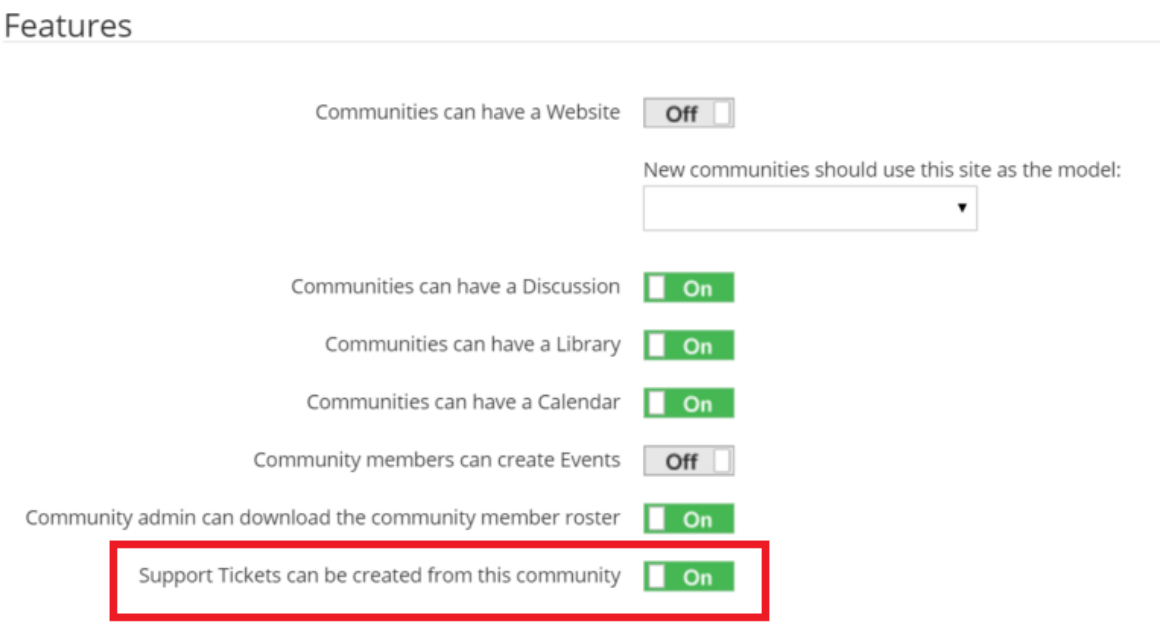


This information is used by Higher Logic to configure your community to create tickets.

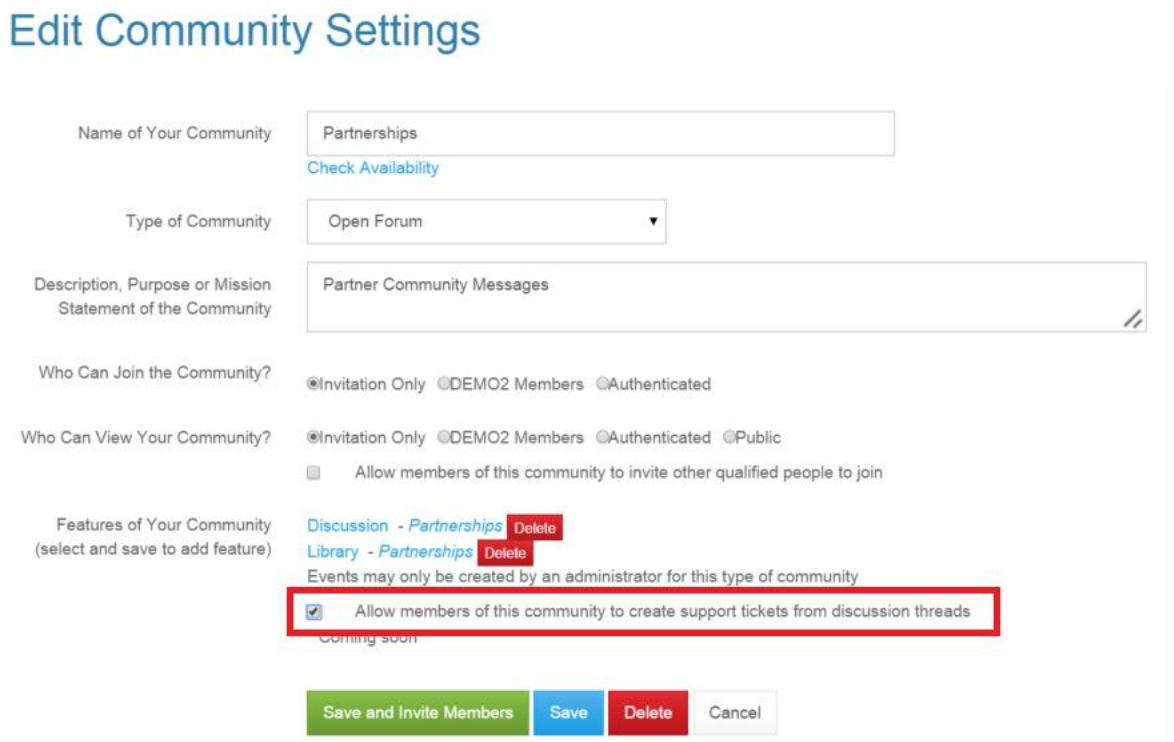
Community Setup

Within your Higher Logic community there are several steps to enable a tickets to be created from discussion threads.

Community Types. Each community type that you want to allow tickets to be created from must first have this feature enabled. In CCAdmin, under **Community Types**, under each community type that you want to enable ticket submissions, scroll down to the **Features** section and set **Support Tickets can be created from this community** to ***On***.

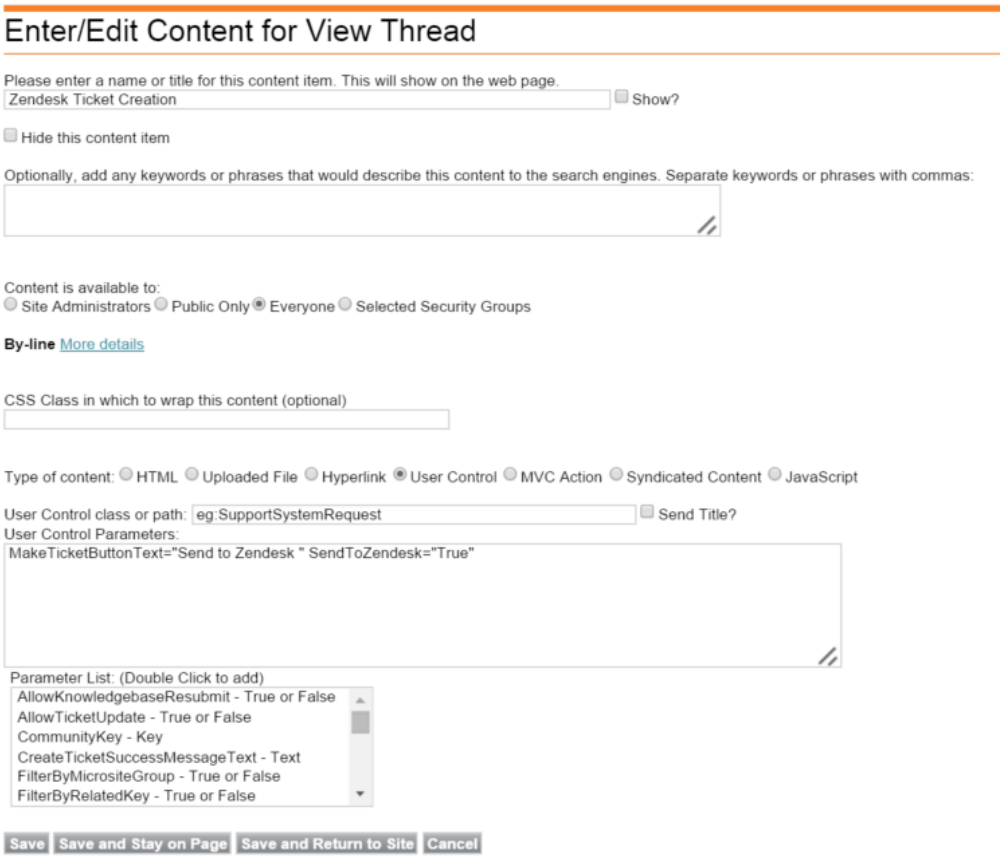


<u>Community Settings.</u> Next, each community of that type you wish to allow tickets from needs to be configured. Go to each community and under the community settings, check **Allow members of this community to create support tickets from discussion threads**.



<u>Support Control</u>. Finally, on the community discussion thread, make sure there is a control for the support system request. This is **User Control** with a path of ***eg:SupportSystemRequest***. You will need to set the ***SendToZendesk="True"***.

Optionally, you may set the some of the texts used by the control; for example the text on the button to submit a ticket can be changed using the ***MakeTicketButtonText*** parameter.
You may also set security on this control to allow only particular security groups permission to see the button to submit tickets to Zendesk. This will probably be Site Administrators or a staff related security group.



Once the Zendesk connectivity has been added by Higher Logic to your community and the communities have been configured, users should be able to submit discussion threads as Zendesk tickets.

4. Installation Check List

Zendesk REST API Token Information		
Parameter*	**Notes**	**Value**
Zendesk URL (*HL Param: ZendeskUrl*)	URL for your Zendesk API. Ex: https://xxx.zendesk.com	
Username (*HL Param: ZendeskUserName*)	Username (email address) that will be used to access Zendesk	
REST API Token (*HL Param: ZendeskAuthToken*)	Token Generated to access your Zendesk. Ex: *VWgKGJKyas3AQE734rWzHxajsQPUUho7014DpaFLV*	
Community Setup		
Parameter	**Notes**	**Value**
Community Type(s)	Which community types should allow tickets?	
Communities	Which communities of the above type should allow tickets?	
Button Text	What text should be on the button to submit tickets?	
Security Groups	Which Security Groups should have access to create a ticket?	

*Note there are several HL parameters that need to be set by Higher Logic for this integration, includeing *IntegratedSupportSystem* that must also be set to True.