

Insights: Zendesk integration with Marketing Cloud

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Collaboration and interaction between cloud applications residing within same or different cloud platforms, continues to offer extensive possibilities to automate business processes. Automation of ticketing and customer support applications, with Marketing cloud, further enhances the customer engagement space. It primarily also serves to improve operational efficiency and deliver the best of customer experience, whilst optimizing revenue generation. In this blog, the essential activities and approach needed to achieve this type of integration, are highlighted below. These consists of 3 parts

- Zendesk set-up
- SAP CPI flow set-up
- Marketing cloud set-up

Zendesk Set-up

Support for customers can happen via several channels, as organizations seek to help their customers resolve issues, some of these channels include

- Send email
- Fill out a support request form in your Zendesk Support portal
- Fill out a support request form on your own web site
- Call you on the telephone
- Text chat with you
- Send you a Tweet
- Post on your Facebook wall

In Zendesk, any of these channels can be activated and for more information, please refer to the page: <https://support.zendesk.com/hc/en-us/articles/203691476>. For this purpose of this article, the focus is how to synchronize events related to a specific account and ticket to Marketing Cloud. This is primarily to be able to take advantage of the 360 degrees view on your customer profile and behaviour. Essential steps to set-up automatic trigger of events from Zendesk to Marketing cloud are highlighted below, for details see Zendesk help site.

a) Setting up the HTTP Target

1. Set-up an S-user account in SAP for the authentication
2. From Zendesk admin, navigate to **Settings > Extensions > add target** .
3. Select **HTTP Target**
4. Configure your target to perform a POST to the URL of the iFlow in CPI
5. Save your settings and proceed to configure a trigger notification using this HTTP Target.

b) Configuring the HTTP Target as a trigger action

When setting up a trigger, there are various conditions that can be used, to send interactions to Marketing cloud. Examples of such conditions include; when a new ticket is created, updated or when there is a status change on a ticket.

1. From Zendesk admin, navigate to **Settings > Business Rules > Triggers**
2. Set-up your conditions for the trigger group.

Conditions

Conditions that must be met for the trigger to run

Meet ALL of the following conditions

Add condition

Meet ANY of the following conditions

Ticket	Is	Created
Ticket	Is	Updated
Status	Changed	

3. If these conditions above are fulfilled an event in form of interaction is sent to out to Marketing cloud, with the payload below.

JSON body

```
1 {
2   "InteractionContactOrigin": "ZENDESK_WEB",
3   "InteractionContactId": "{{ticket.requester.email}}",
4   "CommunicationMedium": "WEB",
5   "InteractionType": "TICKET_ACTIVITY",
6   "InteractionTimeStampUTC": "{{ticket.due_date}}",
7   "MarketingArea": "CXXGLOBAL",
8   "InteractionLanguage": "EN",
9   "DeviceType": "ZENDESK APP",
10  "InteractionDeviceName": "ZENDESK APP",
11  "InteractionSourceTimeStampUTC": "{{ticket.due_date}}",
12  "InteractionContent": "Status:{{ticket.status}};{{ticket.latest_comment}} "
13 }
```

4. Save your trigger.

CPI iFlow Interaction Set-up: To enhance seamless communication between Zendesk and Marketing, an iFlow in CPI is set-up. This iFlow is set-up intelligently, such that several functionalities are built in form of orchestration with Marketing cloud. Below are the 3 functionalities in the iFlow:

1. Query Marketing Cloud Contact API
2. Create Account in Marketing Cloud with Contact API
3. Create Interaction in Marketing Cloud with Interaction API

Primarily, CPI receives the JSON message from Zendesk, via the exposed endpoint and this is converted to an XML message for on-ward processing. The first check in the CPI flow is to query marketing cloud to check if this account exists. The outcome of the query determines the next step in the process, there are two possibilities, based on the outcome of the query.

- If the account exists already, the accountID, email and originID retrieved in the query are mashed up with the original data from Zendesk, to create an interaction on the account
- If the account does not exist already, the original data from Zendesk, is used to create an anonymous account, after which an interaction is created on the account

Subsequently, when a new account with the full data gets created, using the same email as the previously created “anonymous account”, Marketing cloud merges this into a golden record.

Marketing Cloud Set-up:

Set-up in marketing cloud consists of 2 major activities, these are highlighted below

- New OriginID set-up
- New InteractionType set-up

Conclusion:

Once the above 3 set-up activities described above is performed, Zendesk is ready to start sending events to Marketing cloud. In this blog, we have outlined the steps to integrate Zendesk with Marketing cloud intelligently. To deliver memorable customer experience to your customers and members, we can support you to drive this.!