

---

Zendesk Integration  
User Guide

---



## Introduction

Occasionally, a question or comment in a customer forum cannot be resolved right away by a community manager and must be escalated to another employee via a ticketing system. Vanilla's Zendesk integration allows staff users with the right permissions to create a ticket in Zendesk directly from Vanilla.

This guide outlines how to setup the integration and how it works.

## 1. Setting Up Zendesk

### 1.1 Creating an OAuth Connection in Zendesk

The OAuth connection needs to be set up by an Admin Zendesk user.

OAuth will let Vanilla users that have the 'Staff' permission to authenticate themselves to Zendesk so that they can create Zendesk tickets from within Vanilla. Zendesk passwords are not stored in Vanilla.

1.1 From the Admin Home (click on the cog icon), go to Channels > API and ensure that 'Token Access' and 'Password Access' are enabled.

### Channels / API

You can use the Zendesk API to access Zendesk functionality, such as creating your own applications or build apps to add functionality to your Zendesk.

Your use and access to the API is expressly conditioned on your compliance with the terms set forth in our [API Restrictions and Responsibilities](#) and the other documents set forth in the [Zendesk Terms and Conditions](#) and the [Zendesk Privacy Policy](#). If you violate any term, condition or the spirit of these policies or agreements, your access will be revoked.

[Learn more](#)

Settings    OAuth Clients

#### Token Access

Enabled

Enable REST API using tokens. If you use the API with email login when authenticating a user. Example

```
curl -u luc@vanillaforums.com/token:YOUR_TOKEN
```

[Learn more.](#)

Your API token is: 1njc1sapRPt5uHHsvvEXmpbL...

[Generate new token](#)

#### Password Access

Enabled

Enable REST API access using the email address

Note: API password access is required to

1.2 Click on the OAuth Clients tab and click 'Add a client'.

1.3 Fill out the following information:

Client Name: **Vanilla**

Unique Identifier: **Vanilla**

Logo (optional): Save [this logo](#) to your desktop and upload it.

Company: **Vanilla Forums**

Description: **Escalate posts in Vanilla Forums to a Zendesk ticket.**

Redirect URLs:

**`https://[sitename].vanillaforums.com/profile/zendeskconnect`**  
**`https://[sitename].vanillaforums.com/plugin/zendesk/connect`**

Where [sitename] is the name given to your Vanilla site. Your custom domain can also be used but the redirect URLs must be HTTPS.

1.4 Click Save.

The page should refresh and generate a value in the 'Secret' field. This value will be entered into Vanilla when configuring the Zendesk plugin. Copy and paste this value to a Notepad or text file.

## 2. Configuring the Zendesk Plugin in Vanilla

2.1 Enable the Zendesk plugin in your Dashboard: Addons > Browser Addons>Zendesk

2.2 Click on plugin settings and fill out the following information:

Your Zendesk URL: **Your Zendesk URL, ex <https://acme.zendesk.com>**

Unique identifier: **vanilla (the value that was entered in step 1.3)**

Secret: **The secret that was obtained in step 1.4**

2.3 Click 'Save'.

### Zendesk Settings

**Your Zendesk URL**

  
ex. <https://example.zendesk.com>

**Unique Identifier**

**Secret**

### 3. Global Login Option

There are two ways of authenticating Vanilla to Zendesk. The recommended way is for each staff member to authenticate themselves using their own Zendesk credentials. This way, you will be able to see which staff member created the ticket in Zendesk and properly use Zendesk's full functionality.

The other way is to use a Global Login. This allows staff members that do not have a Zendesk account to create tickets. The downside is that all tickets will show as having been created by the same user.

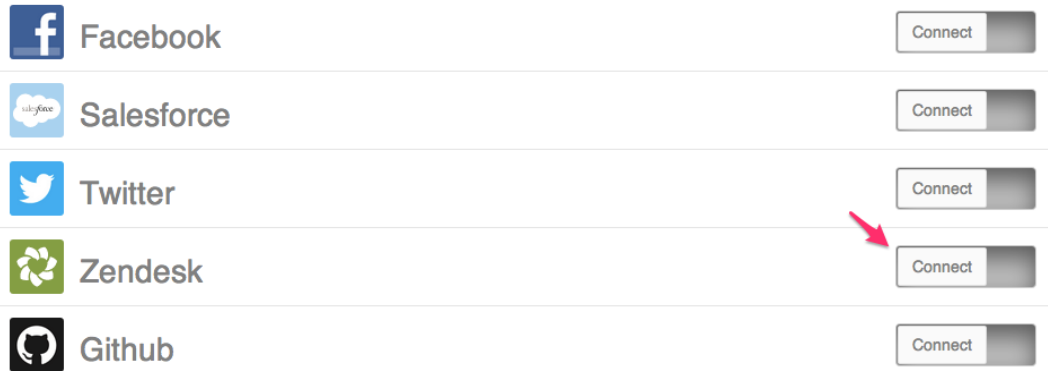
Authentication of Vanilla users to Zendesk is done using OAuth. Zendesk usernames and passwords are never entered into Vanilla and are not stored in Vanilla. The authentication uses secure tokens that can be revoked at any time by your Zendesk Administrator.

3.1 To configure the Global Connection, click Enable. You will be redirected to Zendesk and asked to enter username and password for the Zendesk user that you want to use to make the global connection.

## 4. Using the Integration

### 4.1 Authenticating Individual Users

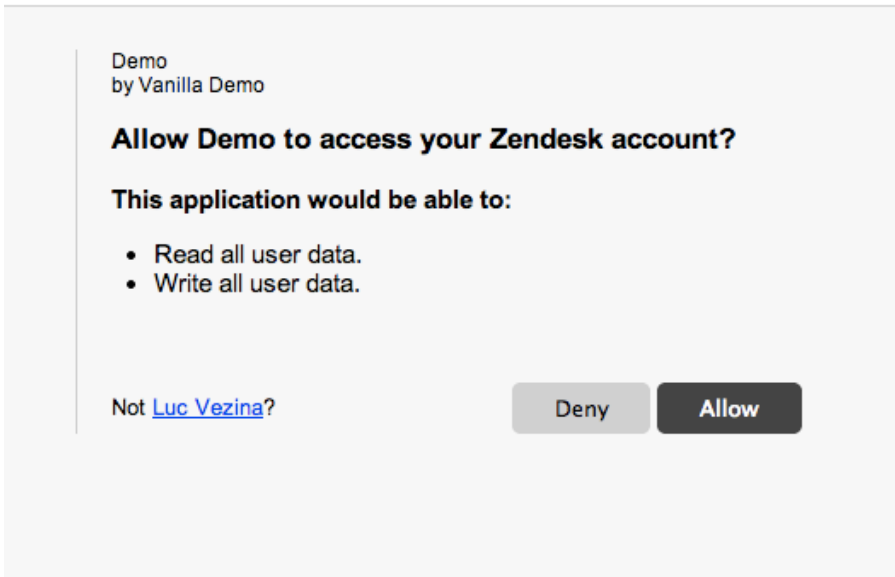
Individual staff members must authenticate themselves to Zendesk before being able to create tickets. (This is not necessary if you are using the Global Login option.) To authenticate yourself, go to Edit Profile > Social Logins and connect to Zendesk.



4.2 If a staff member attempts to create a ticket and is not authenticated, a pop-up will prompt the user to authenticate.

4.3 Only users in Roles with the 'Staff' permission will be able to create tickets.

4.4 When connecting for the first time, you will be prompted to log into Zendesk (if not already logged in) and allow Vanilla to access your Zendesk account.

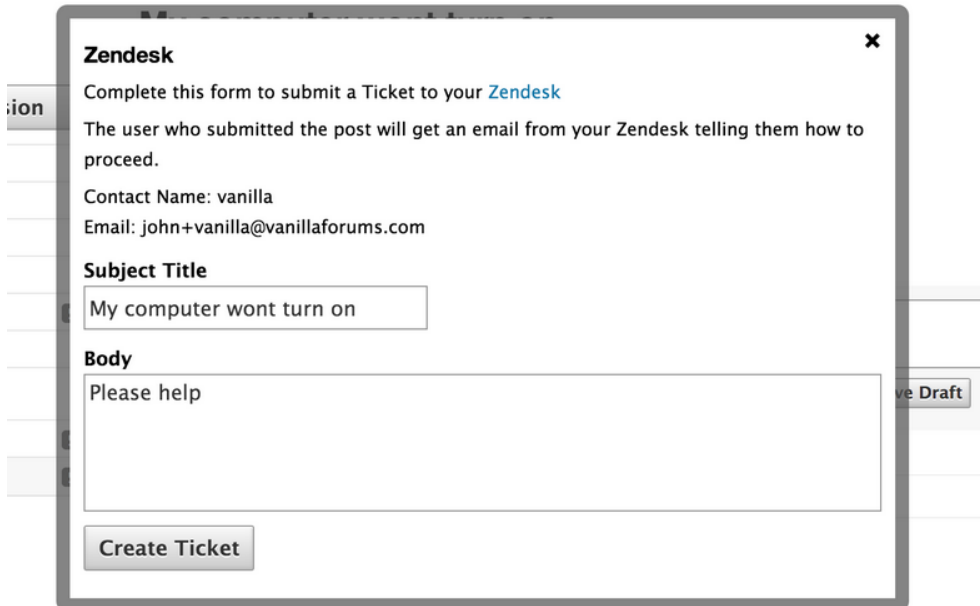


## 5. Creating a Ticket

5.1 To create a ticket, select 'Create Zendesk Ticket' from the gear icon drop down:



5.2 The customer username and email, discussion title and comment body will be pre-populated. The discussion title and comment body can be edited.



5.3 The ticket will be created in Zendesk and an information panel will be displayed (to staff only) under the post. The ticket status will be updated each time the page is

loaded.


## My computer wont turn on



**vanilla** admin  
10:06am in General

Please help

▶ Flag

 **Ticket · Zendesk**  
10:08am by vanilla

<b>Issue Number</b>	25	<b>Status</b>	new
<b>Last Updated</b>	10:08am		

Leave a Comment

5.4 The Ticket will appear in Zendesk, it will include a link back to the comment or discussion in Vanilla:

**Tickets requiring your attention (1)** [What is this?](#)

	ID	SUBJECT	REQUESTER	REQUESTER UPDATED
	#25	My computer wont turn on	vanilla	Today 11:08

**new** Ticket #25

My computer wont turn on  
Please help  
--  
This ticket was generated from: <http://localhost/discussion/62/my-computer-wont-turn-on/p1>

Latest comment Today 11:08

Please help  
--  
This ticket was generated from: <http://localhost/discussion/62/my-computer-wont-turn-on/p1>



## 6. Notes

- When entering the callback URLs into Zendesk, be sure to remove any trailing spaces.