Office@Hand for Zendesk

Admin Guide

Contents

RingCentral®

Introduction

About Office@Hand for Zendesk

Office@Hand for Zendesk provides seamless integration between the Zendesk application and your Office@Hand services to enable improved customer retention, greater agent productivity, and advanced business processes.

It offers these features:

Complete cloud-based app cloud integration

- Use your browser on any platform (Windows®, Mac®); no software installation is needed.
- Make or receive calls through the Office@Hand phone system, directly from your account within Zendesk.

Increased call efficiency

- With simple click-to-dial from within Zendesk, you can spend more time servicing clients and less time dialing.
- Save time by eliminating misdials.

Enhanced streamline of your customer interaction

- Incoming callers are instantly matched to existing client records, which are automatically displayed.
- Tickets are created automatically when a call arrives.

About this Guide

This guide is specifically designed for administrators of Office@Hand for Zendesk. This guide is not intended for Zendesk users and does not provide any information on how to use the application or any related information. This administrator guide will show you how to set up your Zendesk instance to enable users of Office@Hand for Zendesk .

About Zendesk

Zendesk is customer service software based in the cloud. It features a simple interface that will feel familiar to users. To enhance the customer experience, Zendesk integrates other cloud based services such as Salesforce, Facebook, and Twitter.

Zendesk includes ticketing, self-service options, and the most-needed customer support features.

Zendesk streamlines customer support with time-saving tools such as ticket views, triggers, and automations. This helps you get straight to what matters most—better customer service and more meaningful conversations.

Setting Up Office@Hand for Zendesk

RingCentral®

Setting up Office@Hand for Zendesk

To set up Office@Hand for Zendesk:

1. Sign in as an administrator to your Office@Hand for Zendesk and click the **Admin** icon ⚙ in the side bar.
2. Under **Apps**, select **Marketplace**, then find the **Office@Hand** app and click the title. (Figure 1)
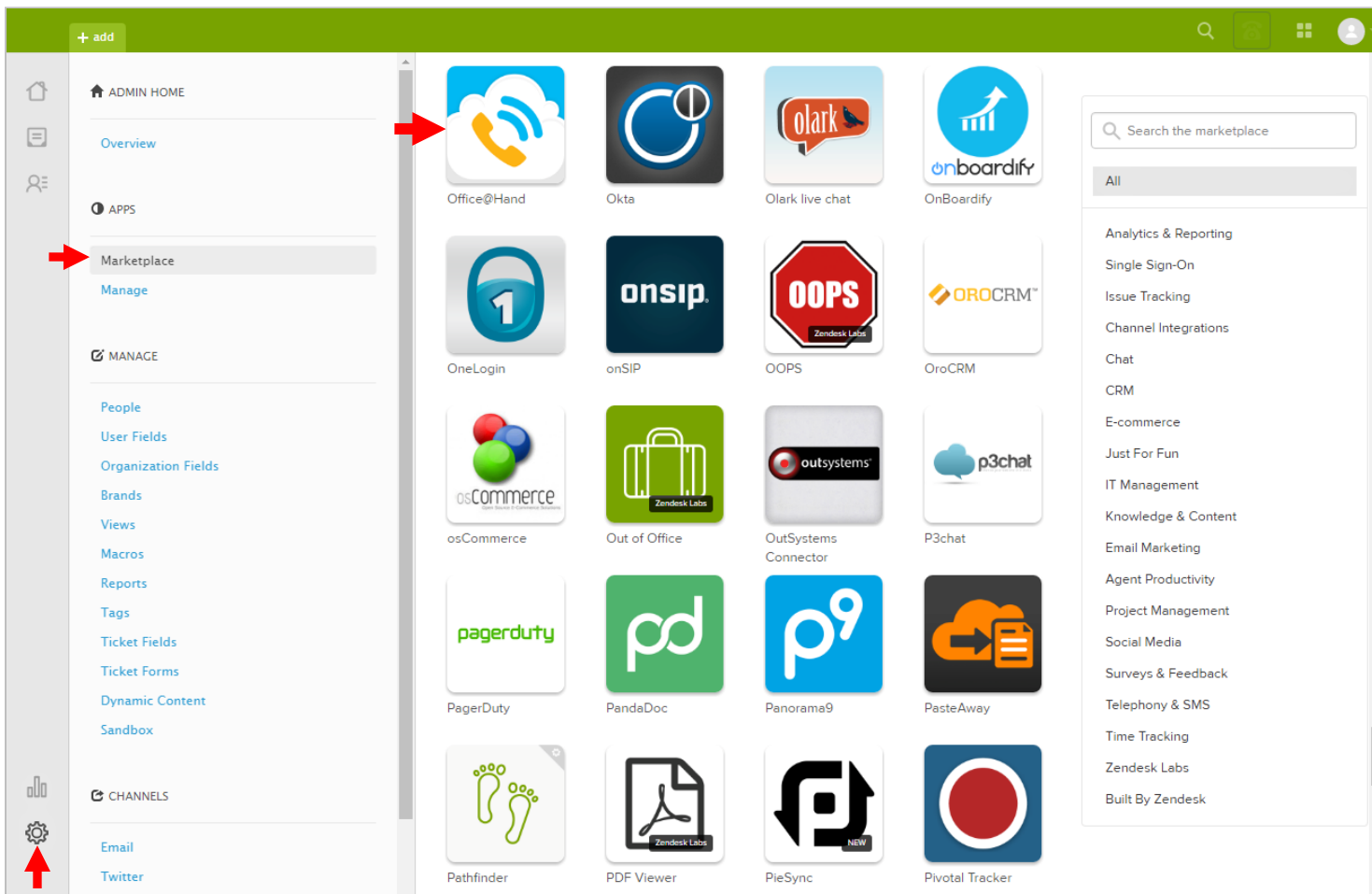

Figure 1

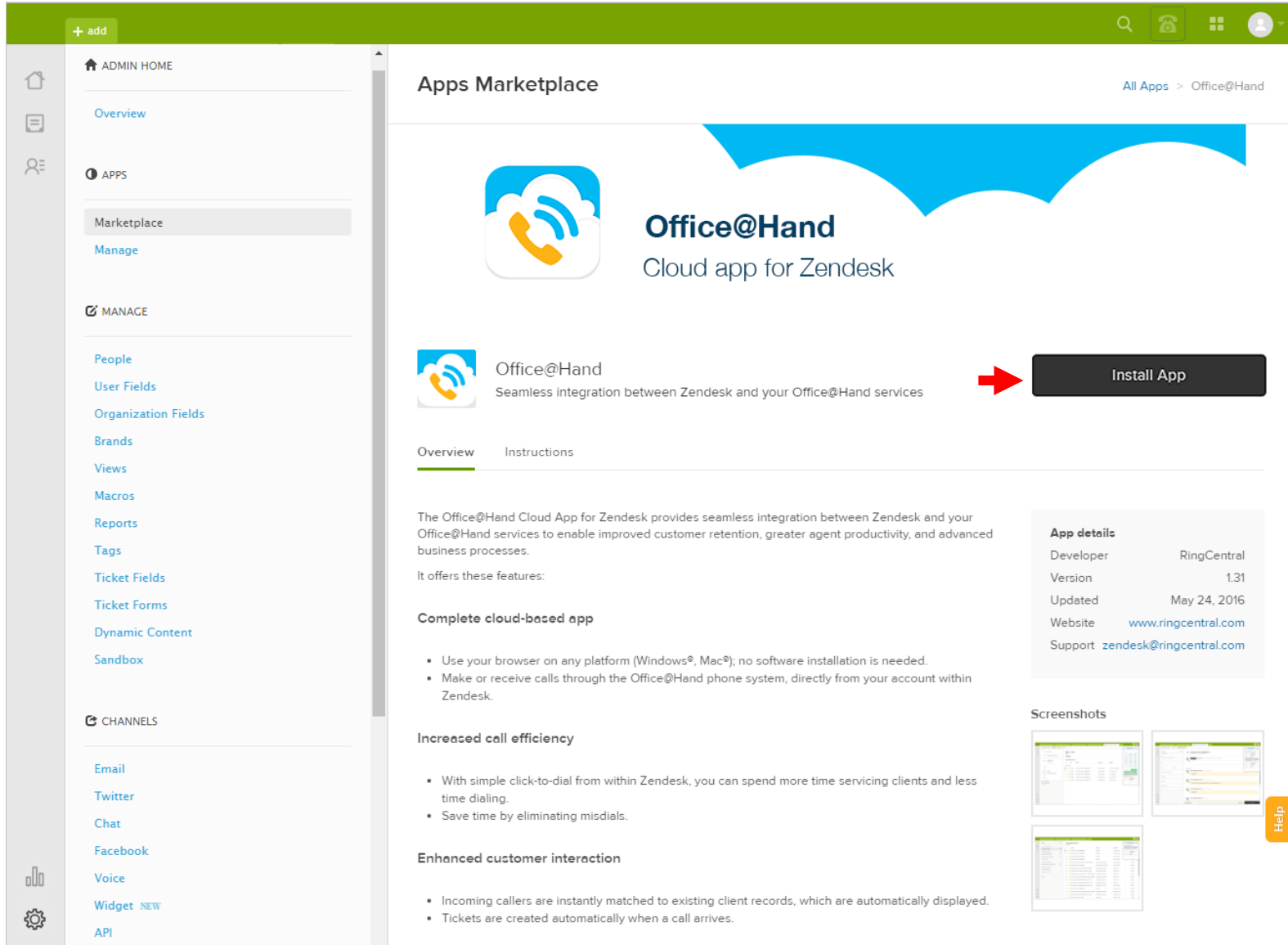3. On the **All Apps > Office@Hand** page that opens, click **Install App** on the right-hand side of the page. You will see a web page. (Figure 2)

Figure 2

4. The ensuing page requires you to fill in a URL. Put the following in the URL field: https://www.zendesk.com/apps/officehand (Figure 3)
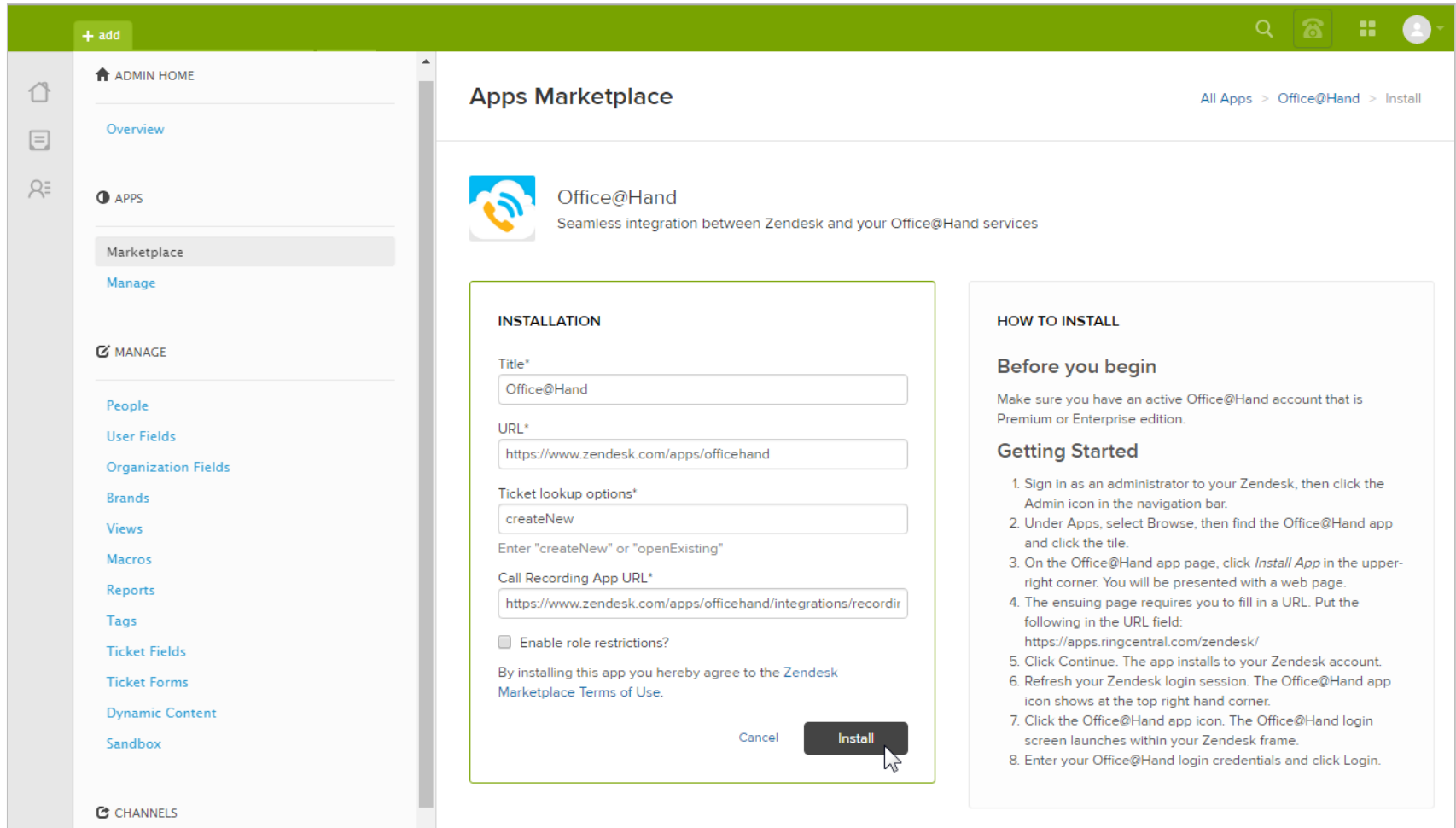
Figure 3

5. Click **Install** to install the Office@Hand app to your Zendesk account.

6. Refresh your Zendesk login session. The Office@Hand app icon shows at the top right hand corner, provided you did not disable the App for your own profile in the previous steps. (Figure 4)
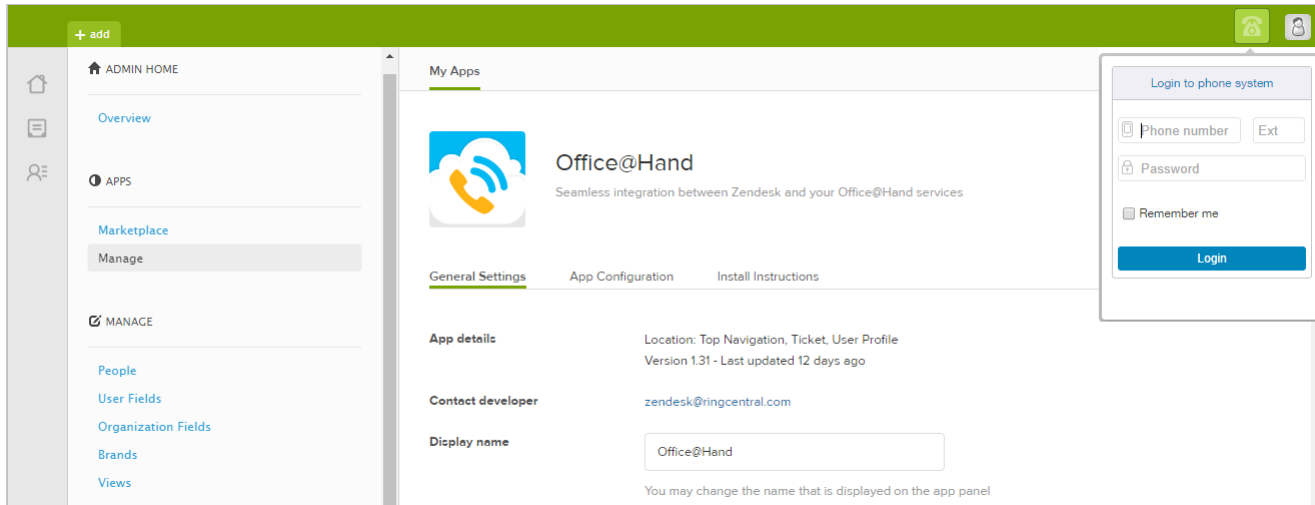
Figure 4

7. Click the Office@Hand app icon. The Office@Hand login screen launches within your Zendesk frame. (Figure 5)
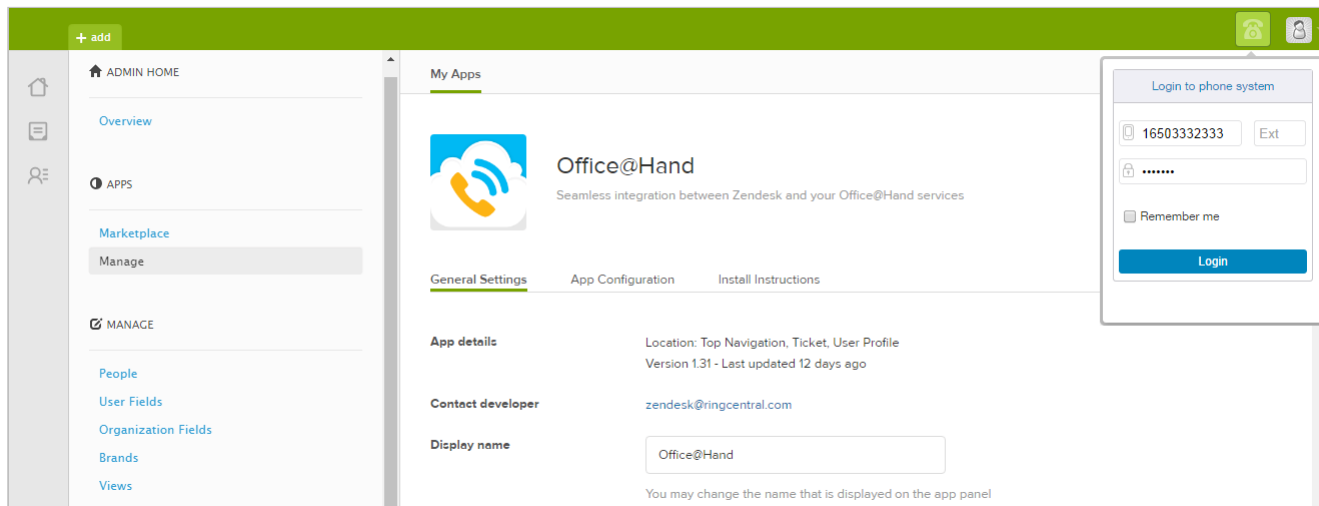
Figure 5

8. Enter your Office@Hand login credentials and click **Login.** (Figure 6)
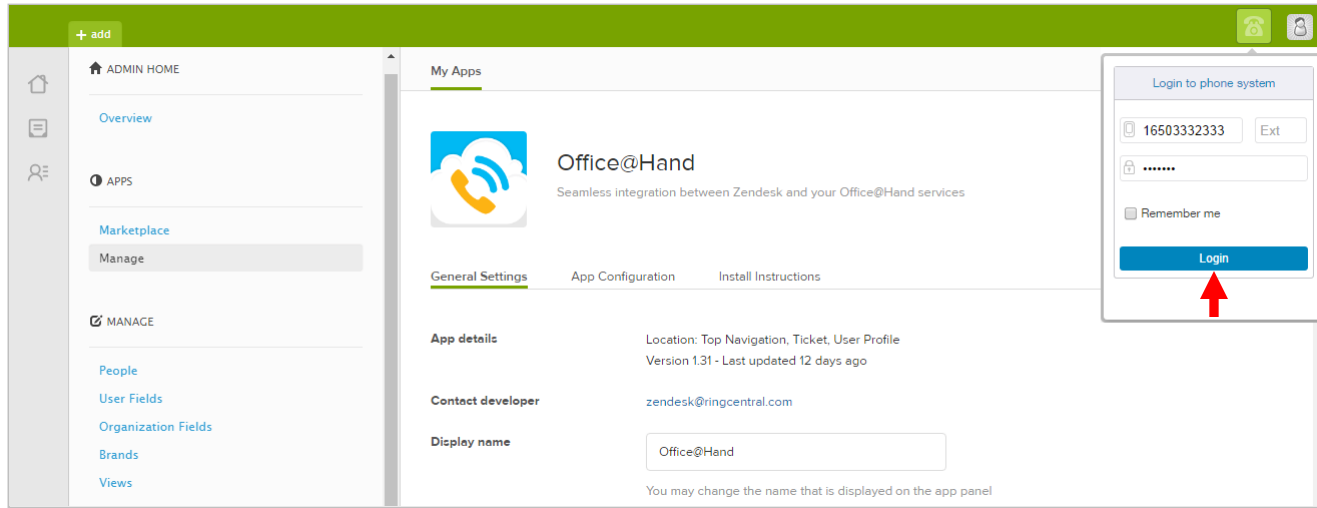
Figure 6

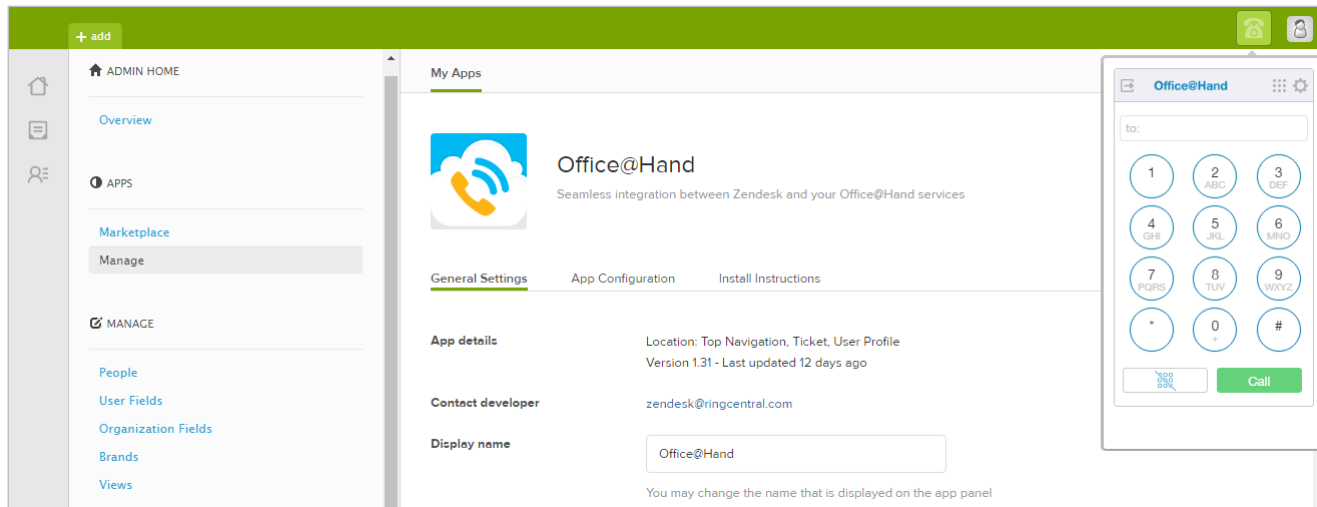9. You can now use Office@Hand for Zendesk to make and receive calls. (Figure 7)

Figure 7

Create Ticket Starting with Private Note

A new Zendesk ticket is created by the Office@Hand app right after a Zendesk agent accepts a call from a customer. Typically, support organizations want the first comment entered by Zendesk Agents on these tickets to be set to private automatically. (Figure 8)

You can set this feature within Zendesk:

1. Sign in as an administrator to your Office@Hand for Zendesk and click the **Admin** icon in the side bar.
2. Select **Tickets** under **SETTINGS**.
3. Uncheck **Agent comments via web are public by default**
4. Please logout and log back in to make the changes be effective
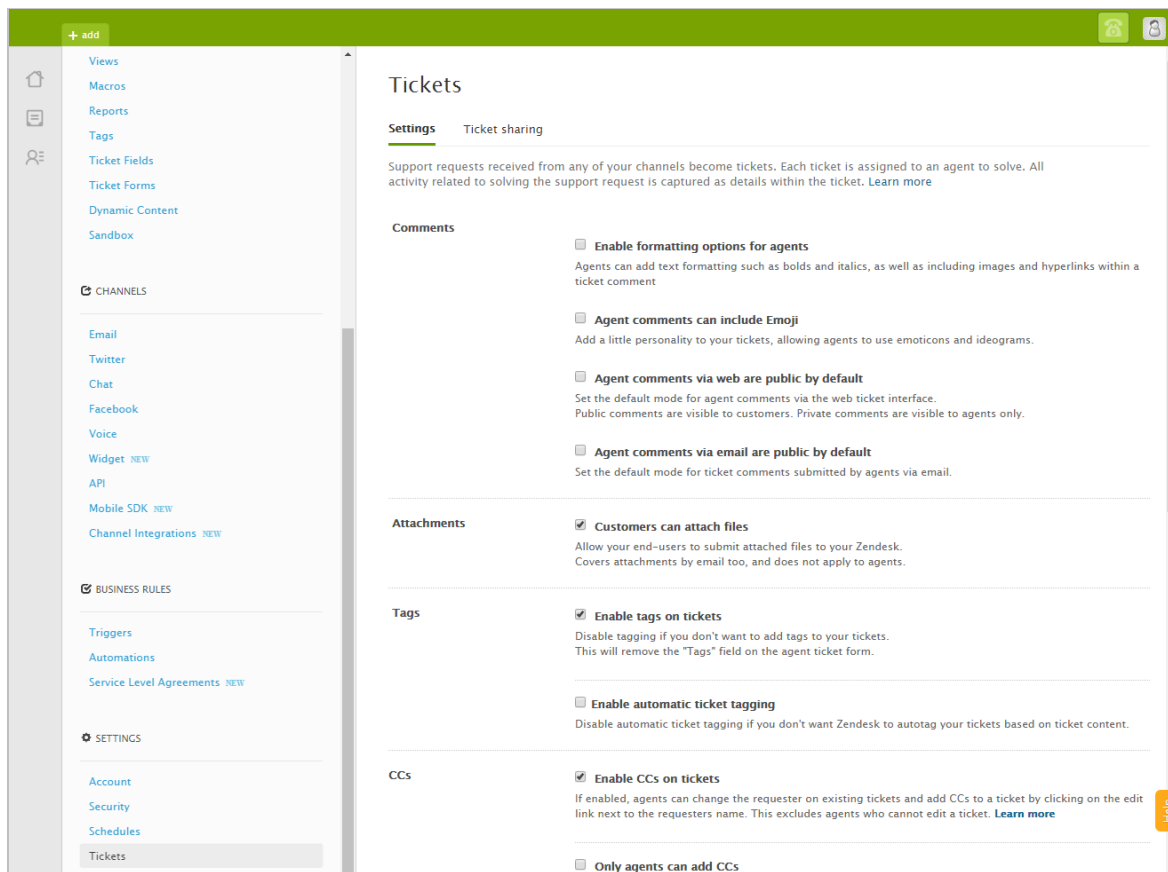
Figure 8

Creating Tickets from Voicemails, Missed Calls, or Text Messages

It is possible to create Zendesk tickets for all the voicemail messages, missed calls, texts or faxes that you get on your Office@Hand phone. This section describes how to enable this feature.

Log into your Office@Hand account at https://service-officeathand.att.com/ by entering your Office@Hand phone number and password. Click **Admin Portal > Users > Users list**. Select the name of the User that you wish to modify. Click **Messages & Notifications > Notifications**. (Figures 9 and 10)
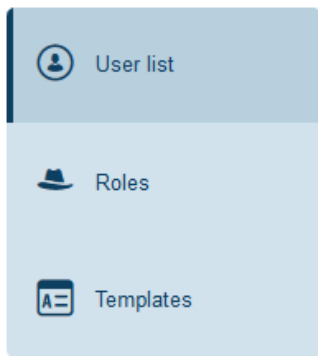
Figure 9
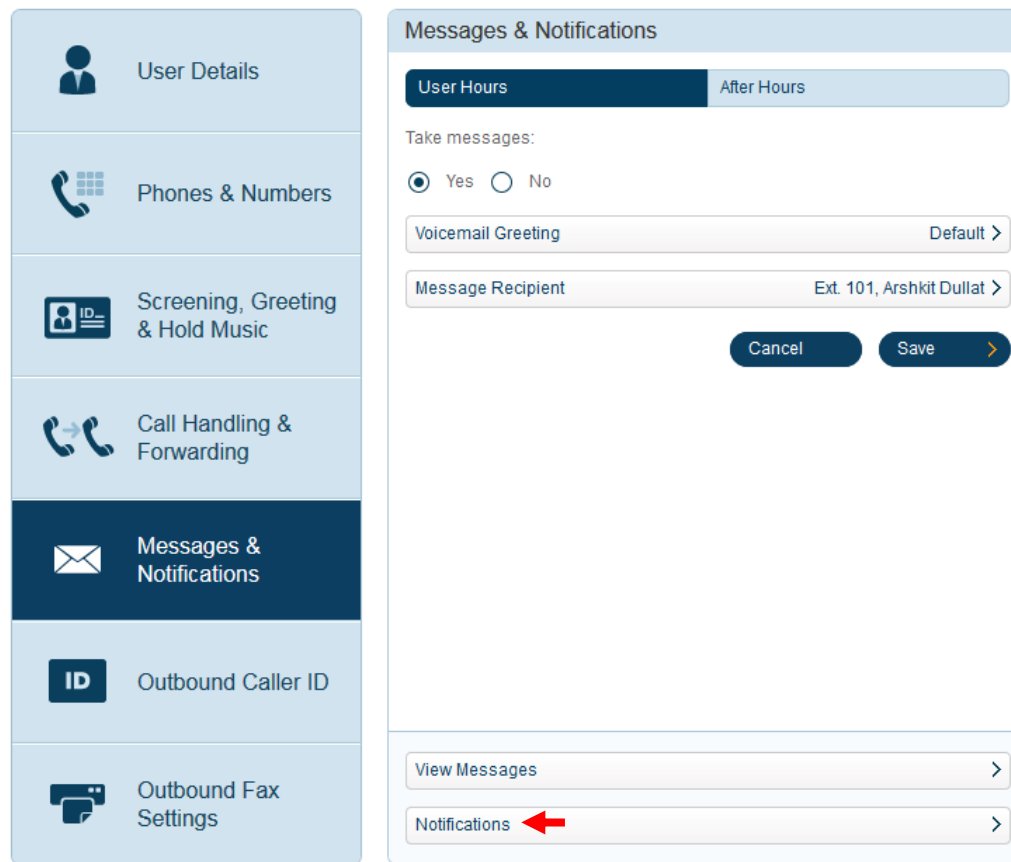
Figure 10

Once you are on the **Messages and Notifications** screen click **Notifications** to bring up the **Notifications** settings pop-up. (Figure 11)
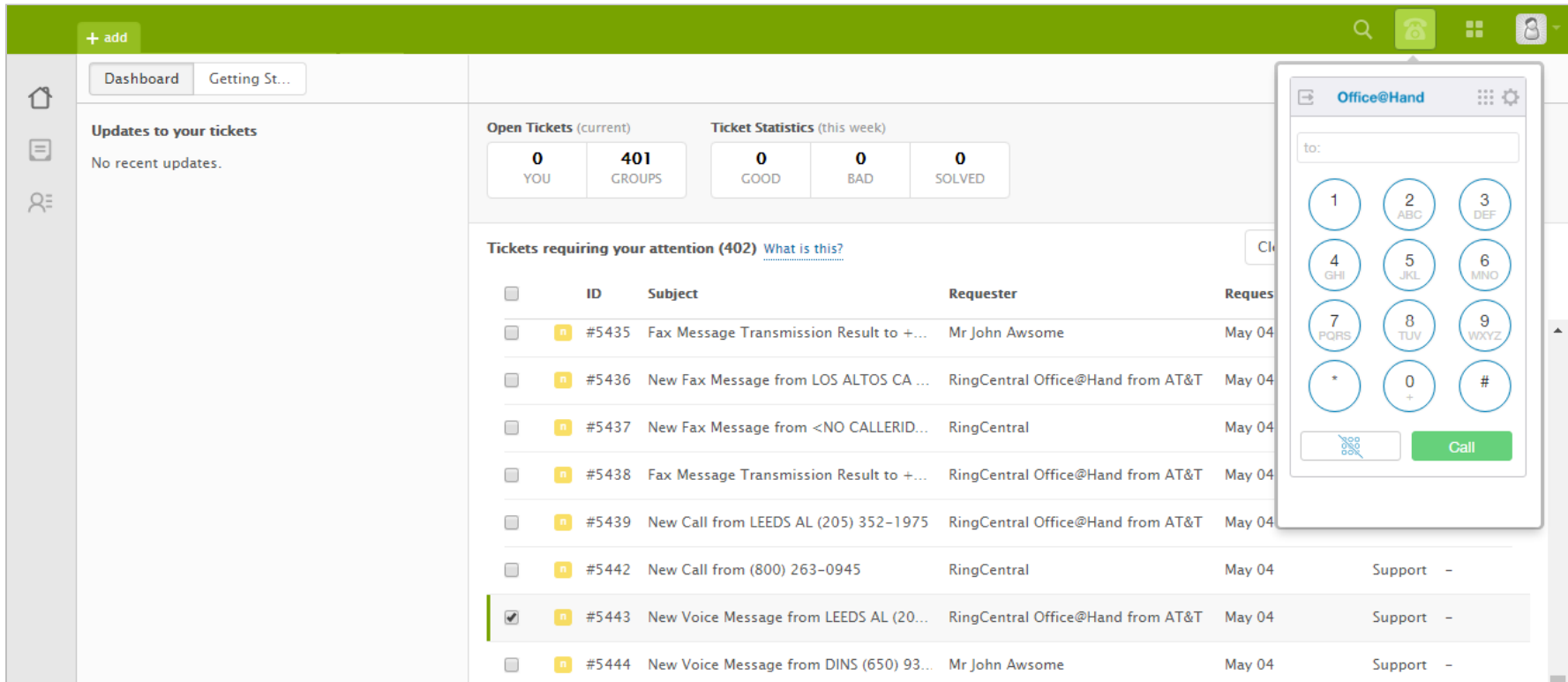

Figure 11

Select all the applicable checkboxes for the features that you want to create tickets for. Enter your Zendesk support email address. It should be something like support@yourcompanyname.zendesk.com.

When a caller leaves a voicemail on your Office@Hand phone, an email is sent to the address specified in the settings above. After Zendesk receives this email, it converts this email in to a Zendesk Ticket for you. Similar tickets will be created for missed calls, faxes or text messages if you have enabled notifications for those items.

Once you log into Zendesk you will see these new tickets assigned to the group the email is associated with.

If the ticket was created with a voicemail, the newly created Zendesk ticket will contain a recording of the voicemail with which you can listen to the message the caller has left. Notice that the Office@Hand dial pad is available for call back. (Figure 12) Click the **Phone** icon ☎ to close the dial pad.

Figure 12

Call Data

Zendesk administrators can add this feature that can be used to add call start time, end time and call duration on every ticket that is created via Office@Hand for Zendesk. Although this feature is optional, with a very small effort the data collected by this feature can be used to develop very powerful reports for your company.

Go to the **Admin** console and click **Ticket Fields**. (Figure 13)
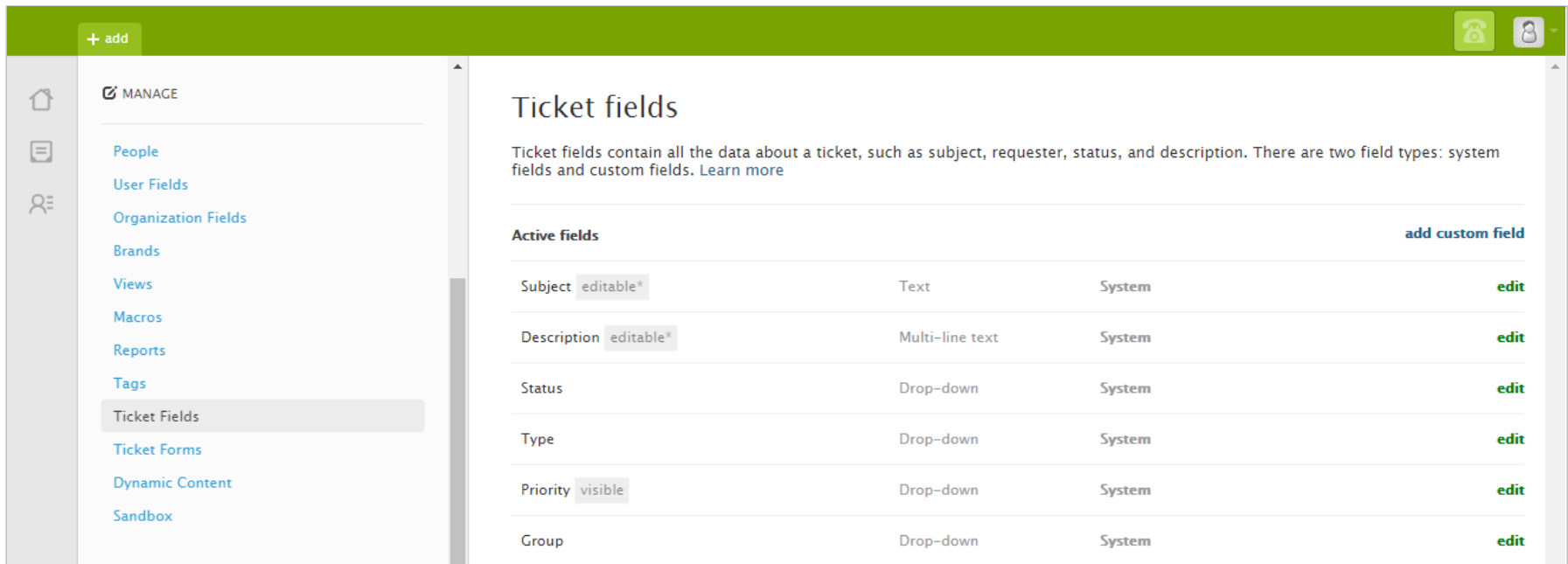

Figure 13

Click **+ add** (see red arrow) to add a custom field link. Click **add custom field**. (Figure 14)
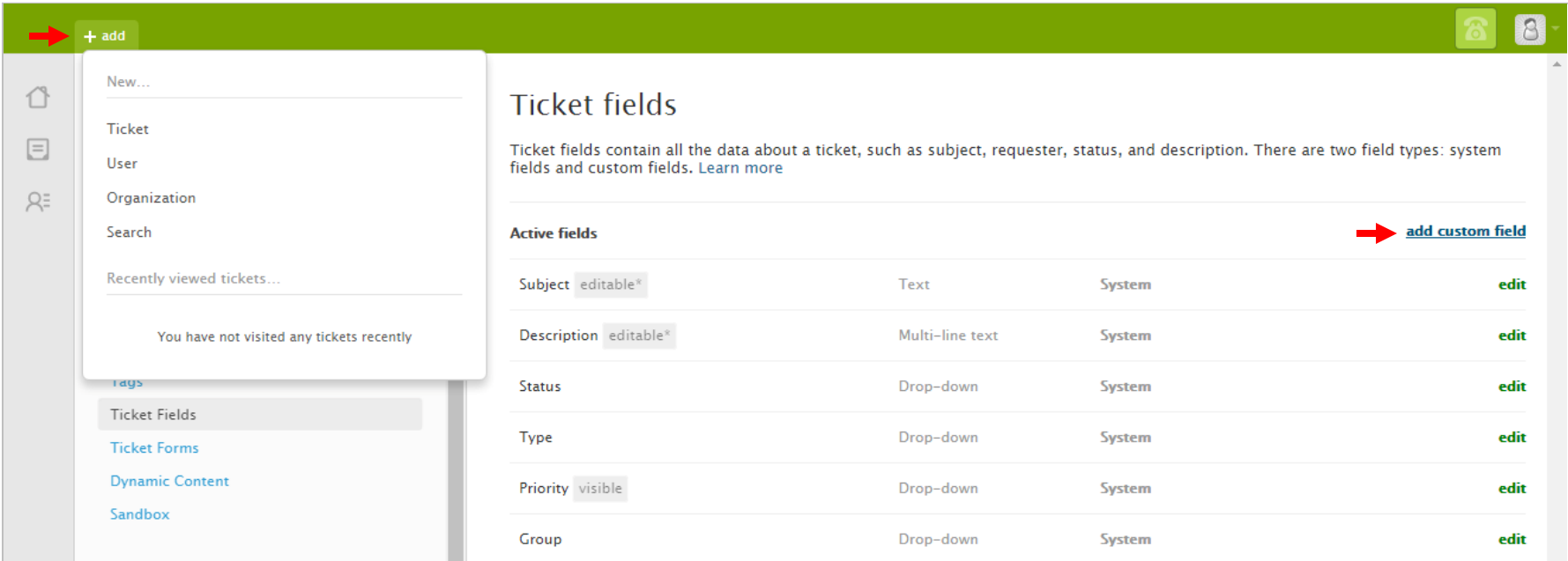

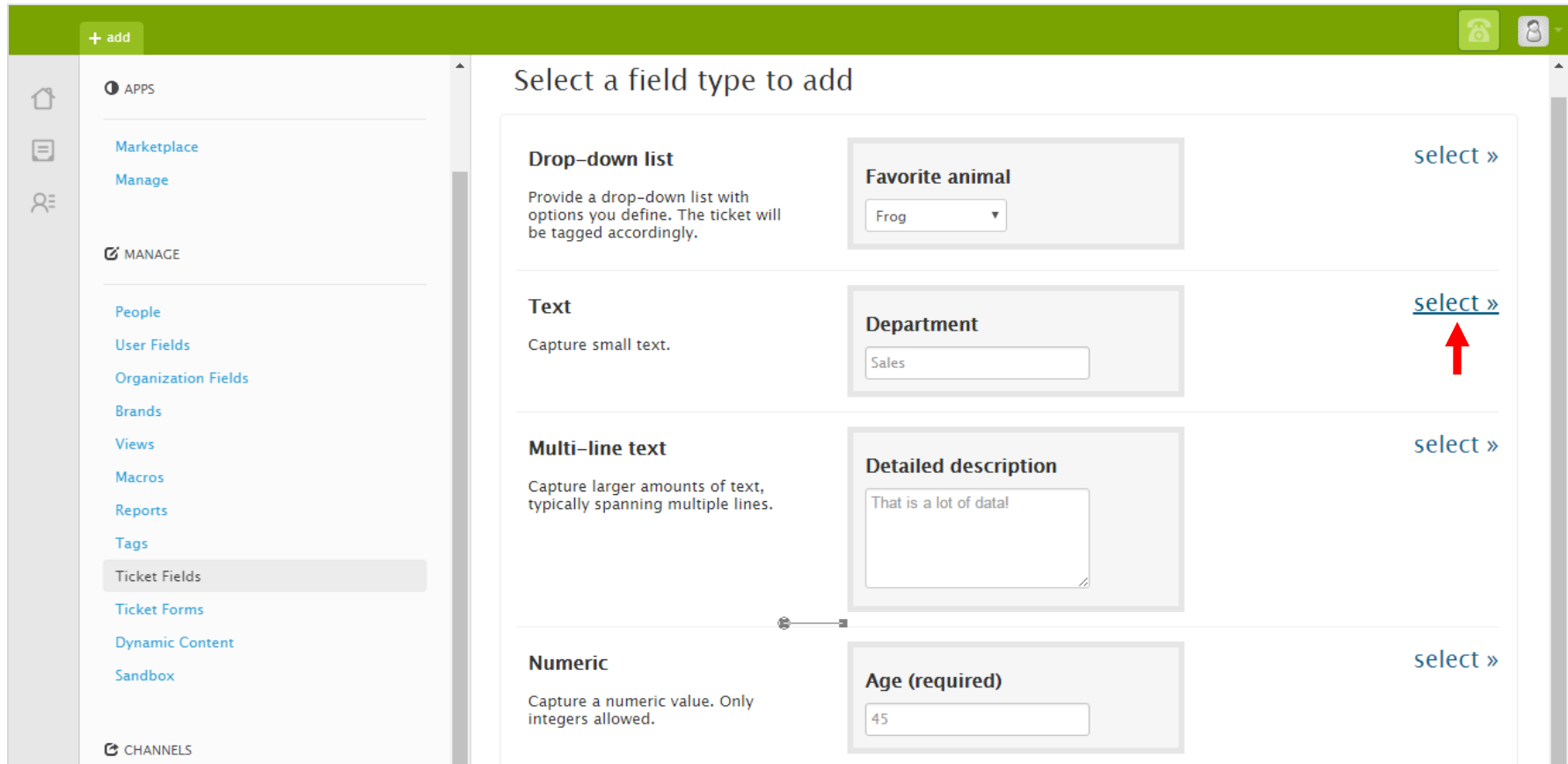Figure 14
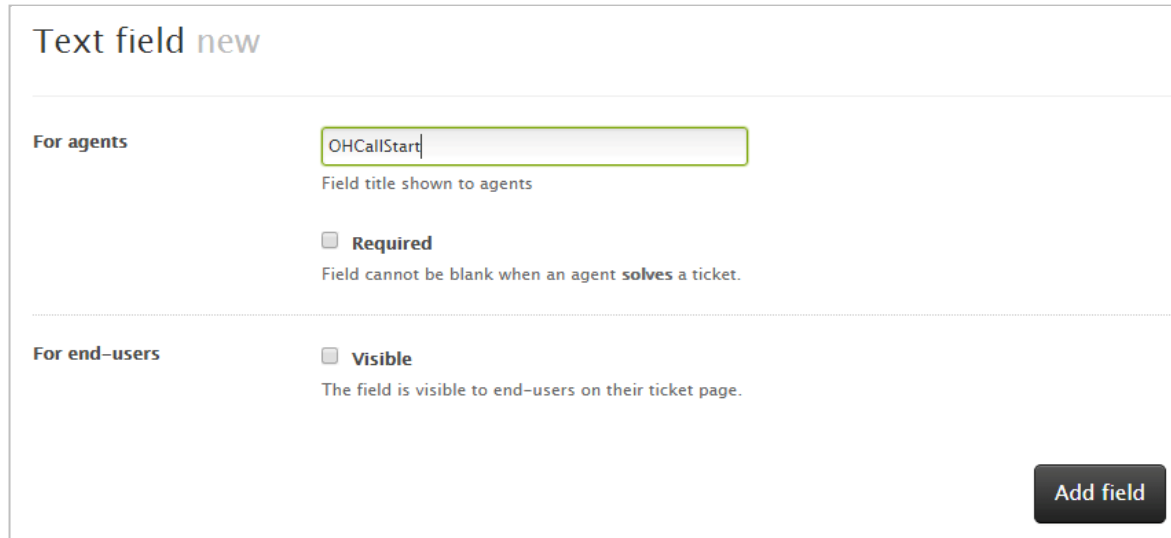
Select a **Text** field type to add. (Figure 15)

Figure 15

Select **Text field new** and enter **OHCallStart** in the text field. (Figure 16)
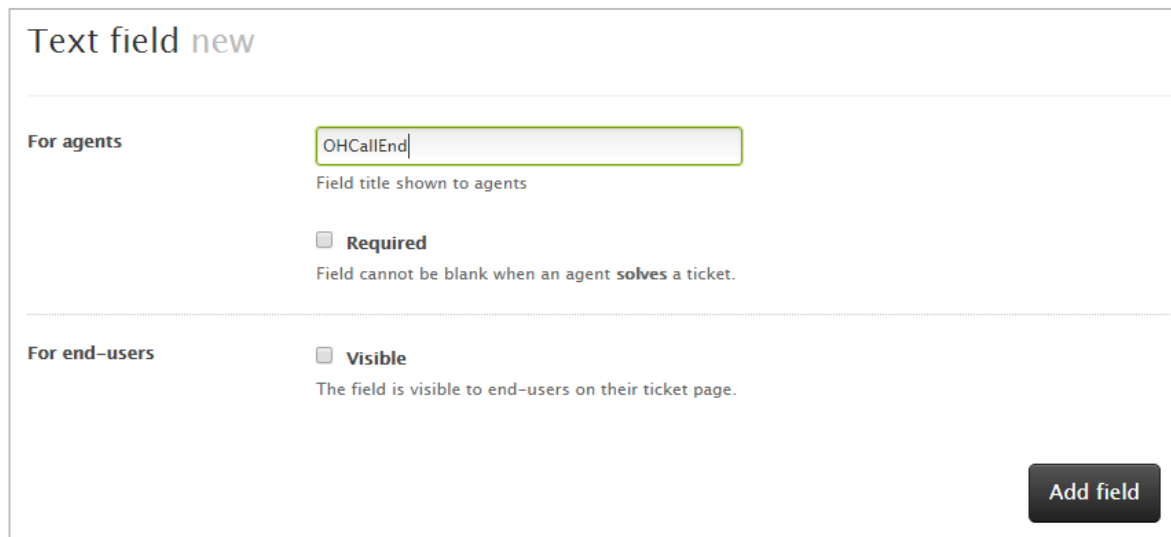
Text field new

For agents

OHCallStart

Field title shown to agents

☐ **Required**
Field cannot be blank when an agent **solves** a ticket.

For end-users

☐ **Visible**
The field is visible to end-users on their ticket page.

Add field

Figure 16

Add another Text field with name of **RCCallEnd**. (Figure17)

Text field new

For agents

OHCallEnd

Field title shown to agents

☐ **Required**
Field cannot be blank when an agent **solves** a ticket.

For end-users

☐ **Visible**
The field is visible to end-users on their ticket page.

Add field

Figure 17

RingCentral

Finally add a numeric field **OHCallDuration**. (Figure 18)

Figure 18

Do not mark any of these fields as required.

Once the fields are created you should see them on Zendesk Ticket fields screen as custom fields. (Figure 19)
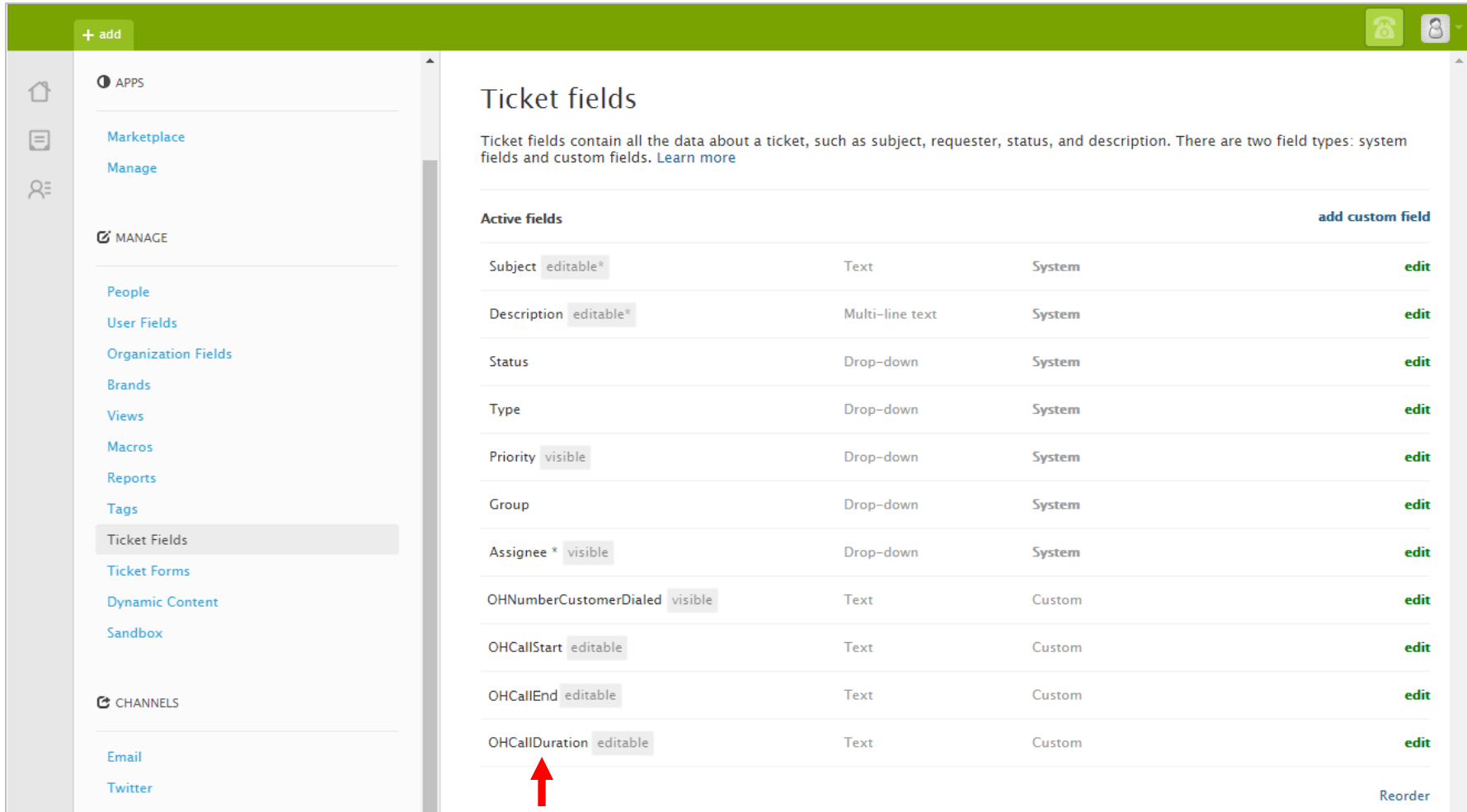

Figure 19

Troubleshooting

Q: I would like to disable this feature for now.

A: You cannot remove individual users from Office@Hand for Zendesk; you can change the application settings to remove user profiles.

Q: Which browsers are supported?

A: The following browsers are supported by Office@Hand for Zendesk:

- Internet Explorer 11 and higher (Windows XP, 7, 8 or higher)
- Firefox 37 and higher (Windows, Mac)
- Chrome 41 and higher (Windows, Mac)
- Safari 8 and higher (Mac)

Q: On logging into the Office@Hand for Zendesk, users are getting this error message: "Your Office@Hand edition does not support Zendesk Integration - please call your Office@Hand account representative to upgrade your Office@Hand edition." What does that mean?

A: Not all Office@Hand editions have the ability to use the Zendesk integration. You may have to upgrade your account to be able to use this feature. Please contact your Office@Hand representative for more information.