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Helpdesk Module Integrations

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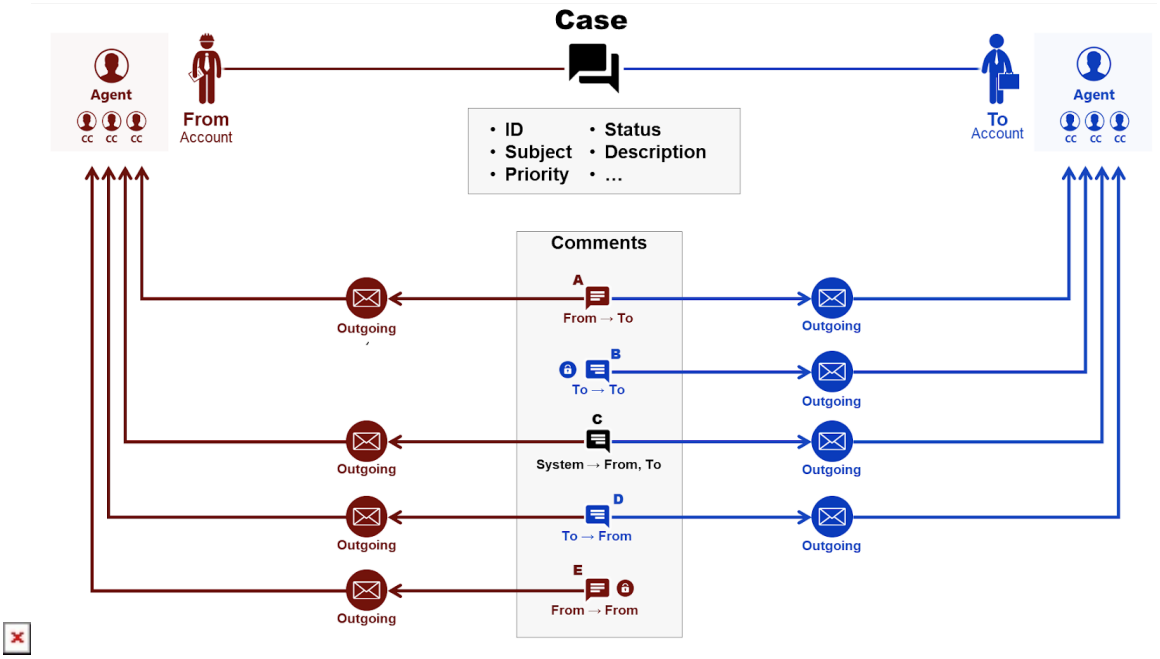
Video Tutorial

Overview

The CloudBlue Connect Helpdesk module allows utilizing helpdesk ticketing system and establishing communication model between Partners to resolve issues or incidents. Although the Connect platform provides an intuitive and easy-to-use interface, Partners might not always monitor their corresponding portals to check for case updates and new messages.

Thereby, the CloudBlue Connect platform offers a range of integration possibilities with third-party messaging systems (e.g., messengers or email services). By integrating the helpdesk module to such systems, Connect users can get notifications about Case updates and directly receive new messages that were generated within a Case as schematically illustrated below:



The Helpdesk module integrations can be implemented by using:

- Application Programming Interface
- Software Development Kits
- Integration platforms, such as:
  - Flowgear
  - Zapier

Integration Examples

The following examples showcase how to integrate the Helpdesk module to the aforementioned third-party messaging systems by using the CloudBlue Connect application on the Zapier platform. Therefore, Connect users can receive:

- Email notifications about new generated Cases

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- New comments via an instant message system

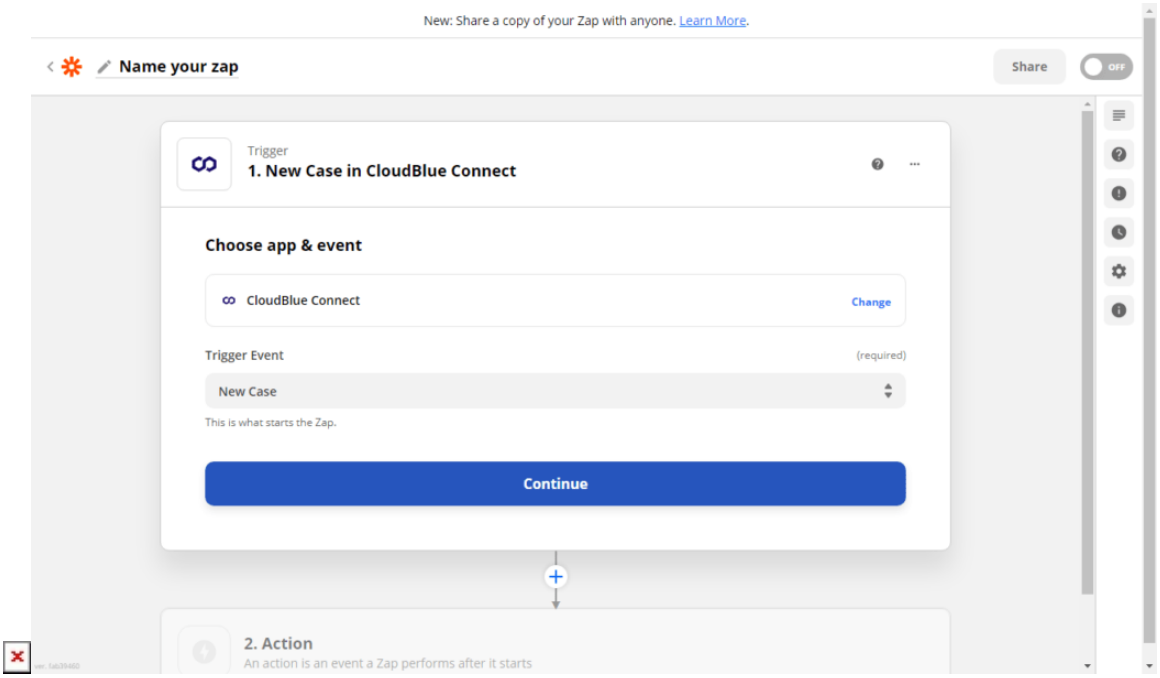
Make sure that the Connect application is included within the **My Apps** section of the Zapier platform. In case this application is not included, create a new Zapier token by accessing the **Integrations** module on Connect. Thereafter, use your *API Key/Handle* to include the Connect application on Zapier.

Refer to the Extensions documentation to learn more about the Zapier platform.

New Case email notifications

This integration example demonstrates how to keep notifying corresponding agents about new generated Cases via emails. The Microsoft Outlook email delivery service will be selected for this integration. Create a new *Zap* on the Zapier platform and follow the guidelines below to create an email notification mechanism for new generated Cases.

Trigger



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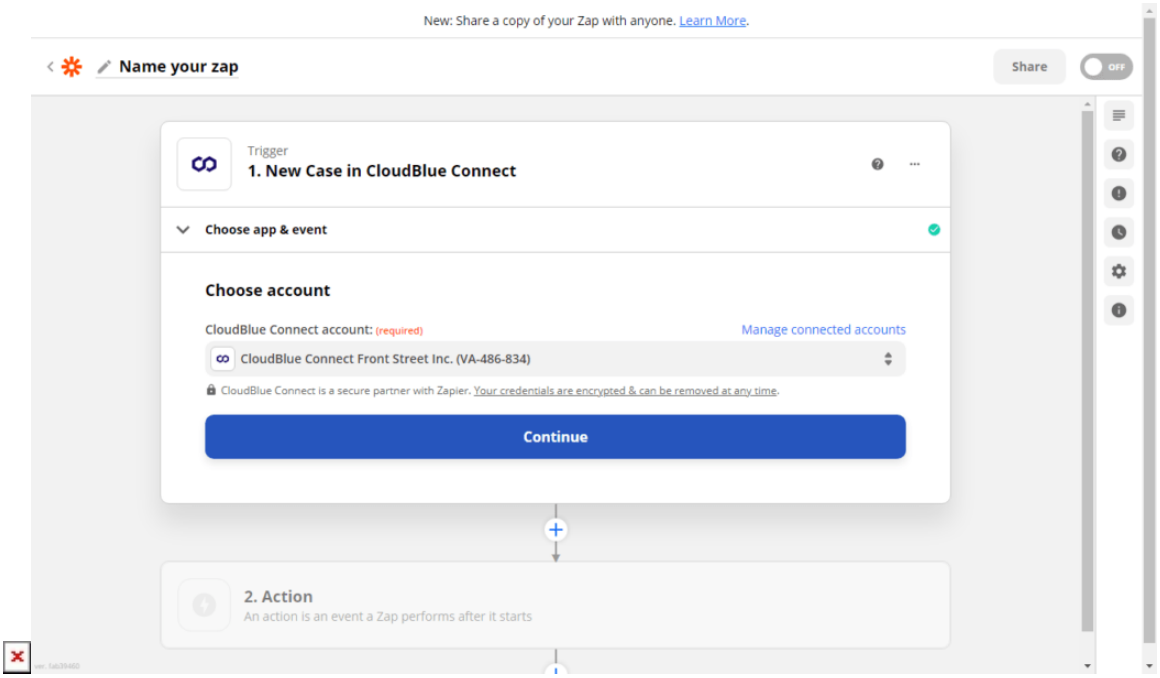

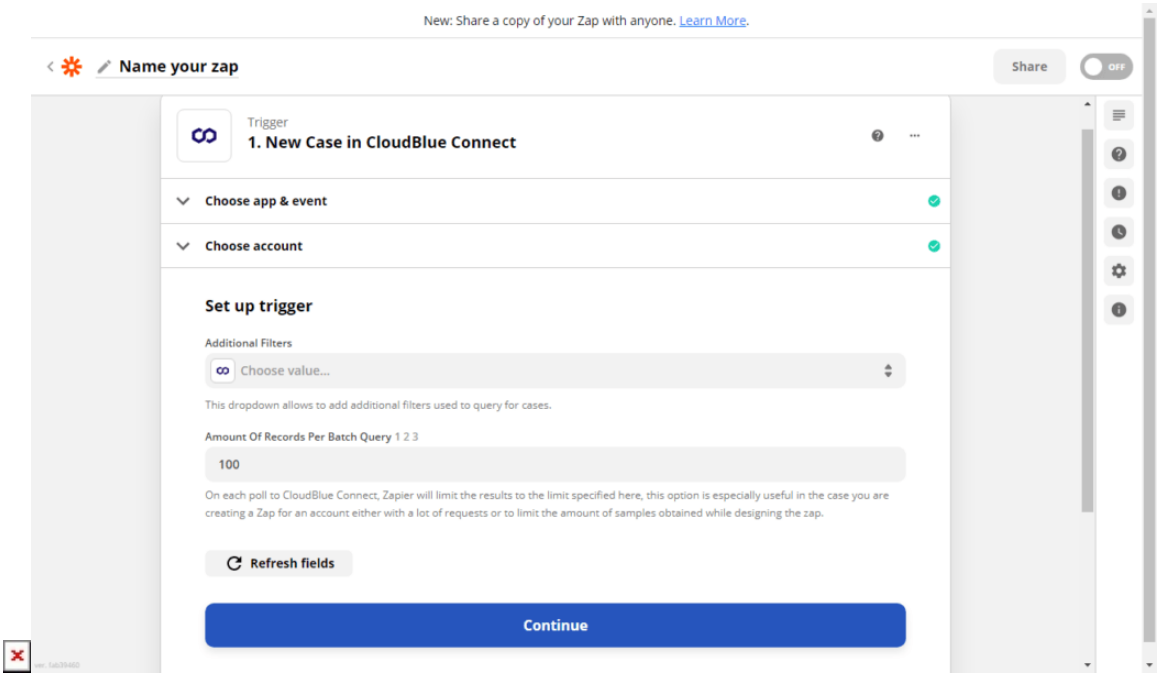

1. Fill out the app and event form as follows:

- **App**: Choose the CloudBlue Connect application. Make sure that this application is connected within the *MyApps* section on the Zapier platform.
- **Trigger Event**: Select *New Case* trigger event from the list.

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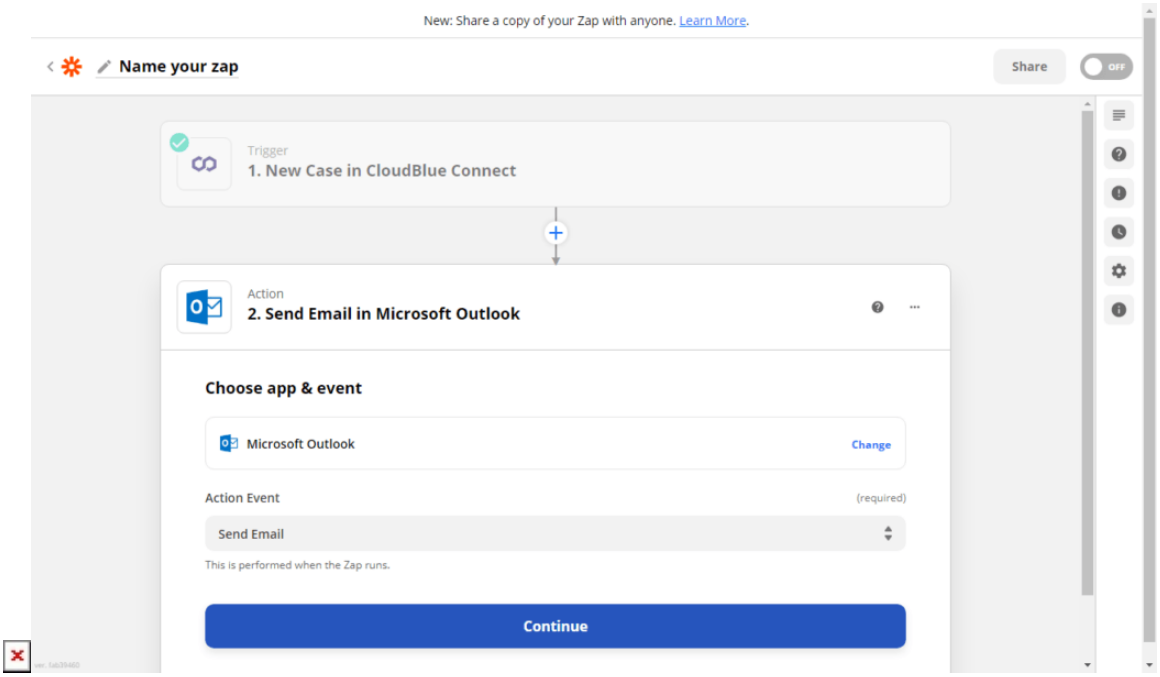
2. Next, the system asks you to choose your Connect account. Ensure that a correct account is selected and click **Continue**.

3. System asks you to specufy additional filters. Use these filters at your discretion to create a subset of cases.

Note that you can also test your created trigger after specifying your filters.

Action

Select a messaging system and specify required actions within the following forms. For this integration example, the MS Outlook email delivery service will be selected and configured.



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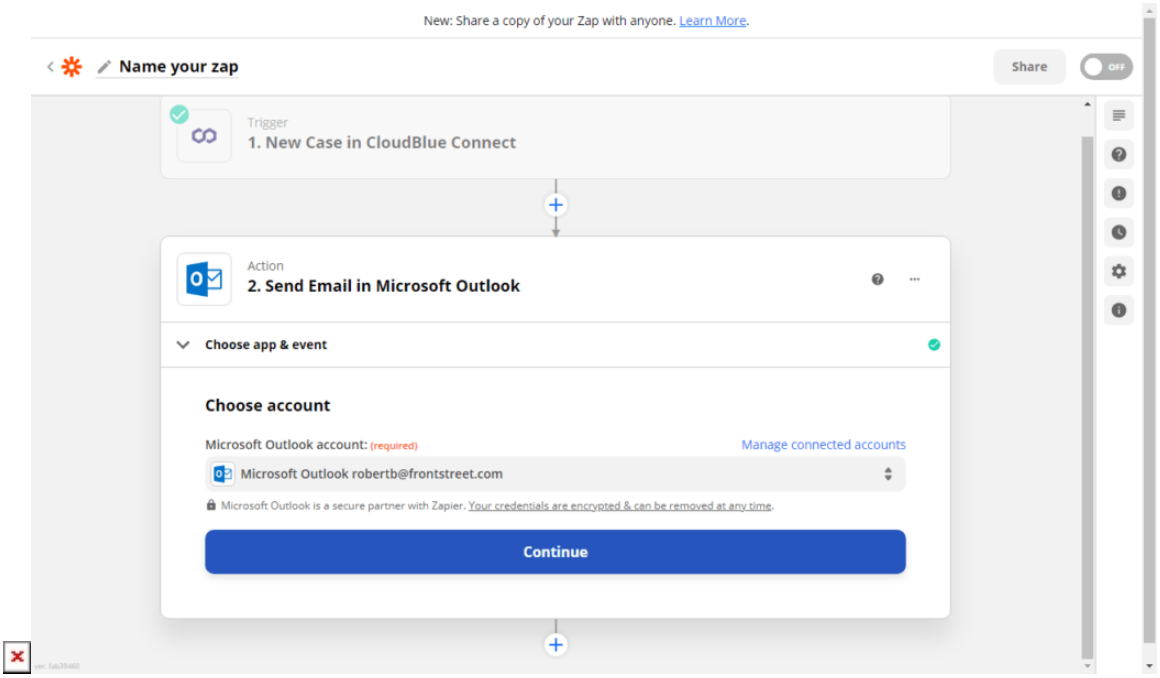

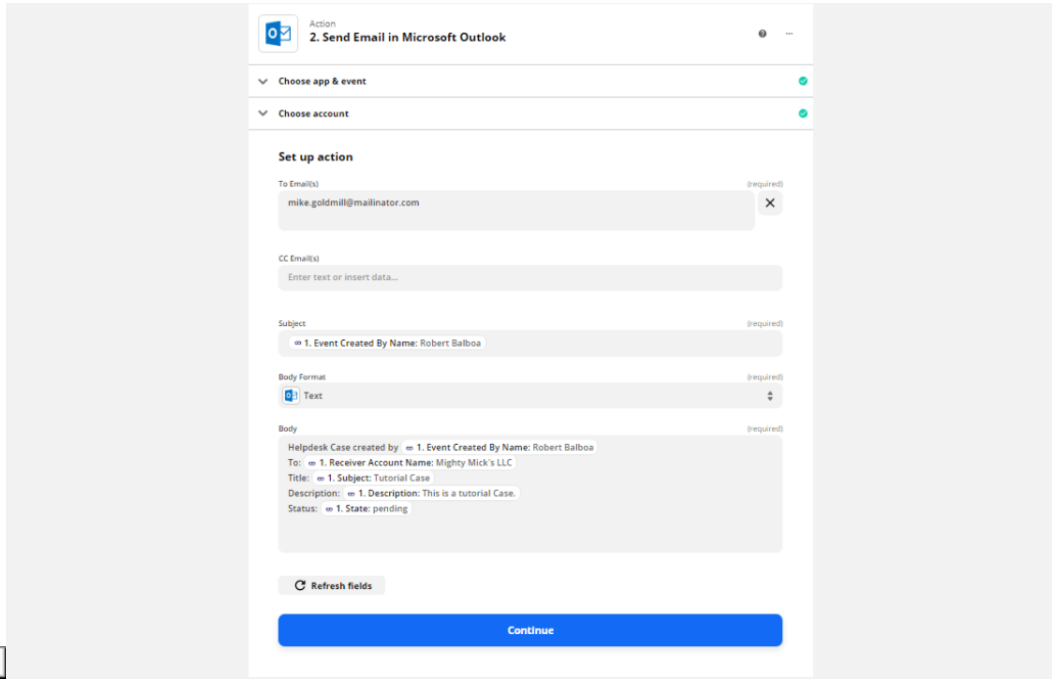

1. Fill out your app and event as follows:

- **App**: Choose your email delivery application.
- **Action Event**: Select *Send Email* action event from the list.

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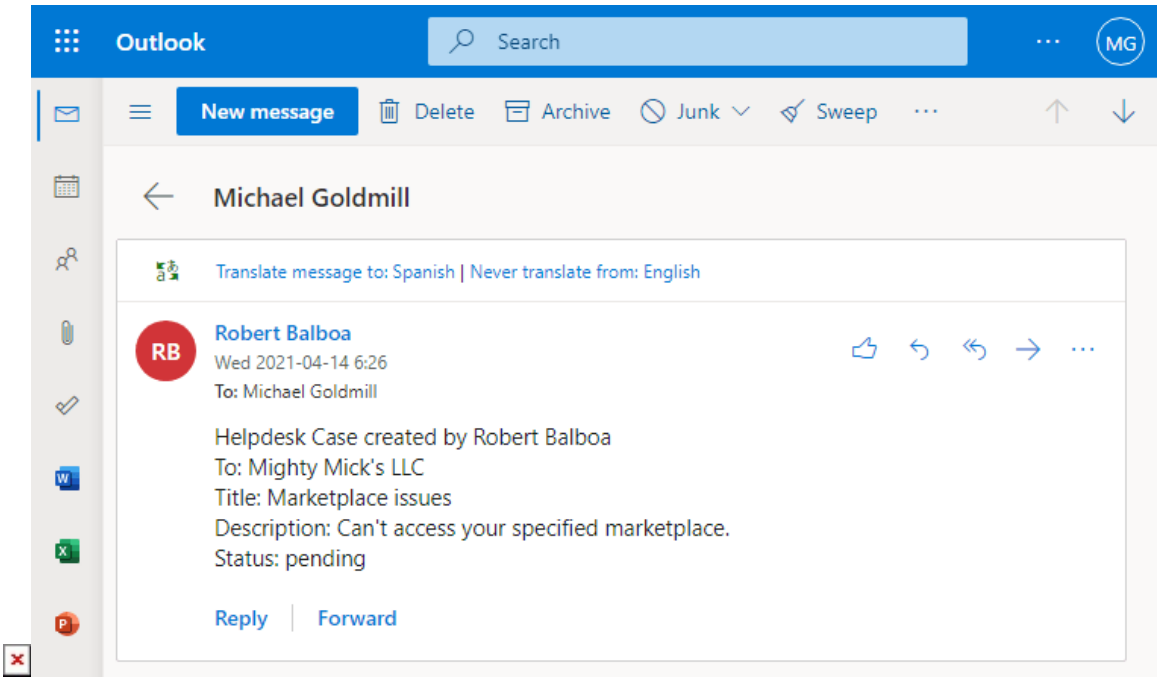
2. The system asks you to choose your application account. Make sure that a correct account is selected and click **Continue**.

3. Specify required and additional fields within the **Set up action** form. Insert required data by using corresponding tags from the list. For example, use the **Event Created by Name** tag to place a Case creator name, use the **Subject** tag to place your Case name, and so on.

4. Test your specified action to finalize your *Zap* creation. As a result, an email should be successfully sent to your specified email address.

Therefore, the helpdesk module will be integrated to your selected email delivery service. Once a new Case is generated, your specified recipients receive an email notification.



Receive comments via messengers

The following example demonstrate how to integrate the helpdesk module to instant message systems and receive comments via messengers. Before configuring triggers and actions on the Zapier platform, it is necessary to create a messenger bot. The Telegram instant messaging service will be selected for this integration example. Use the guidelines below to create a Telegram bot and successfully configure the Helpdesk module integration on Zapier.

Bot Creation

Create a new bot on the Telegram messaging service as follows:

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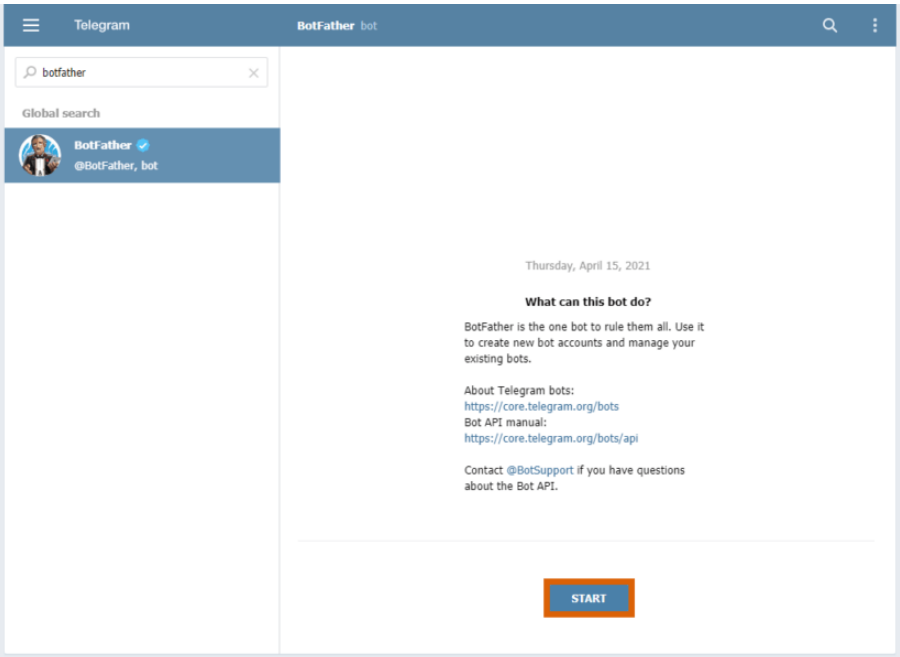

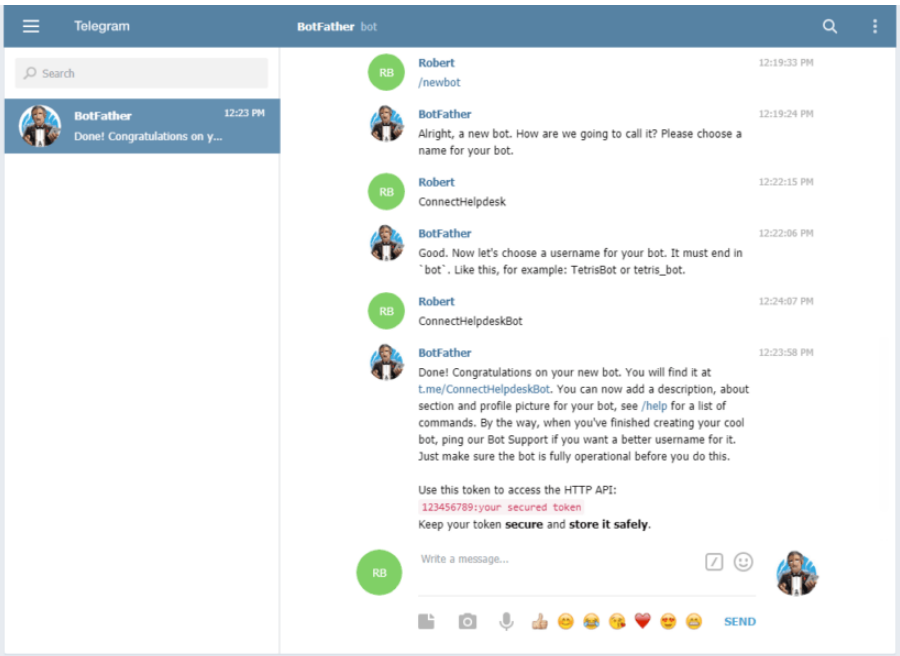

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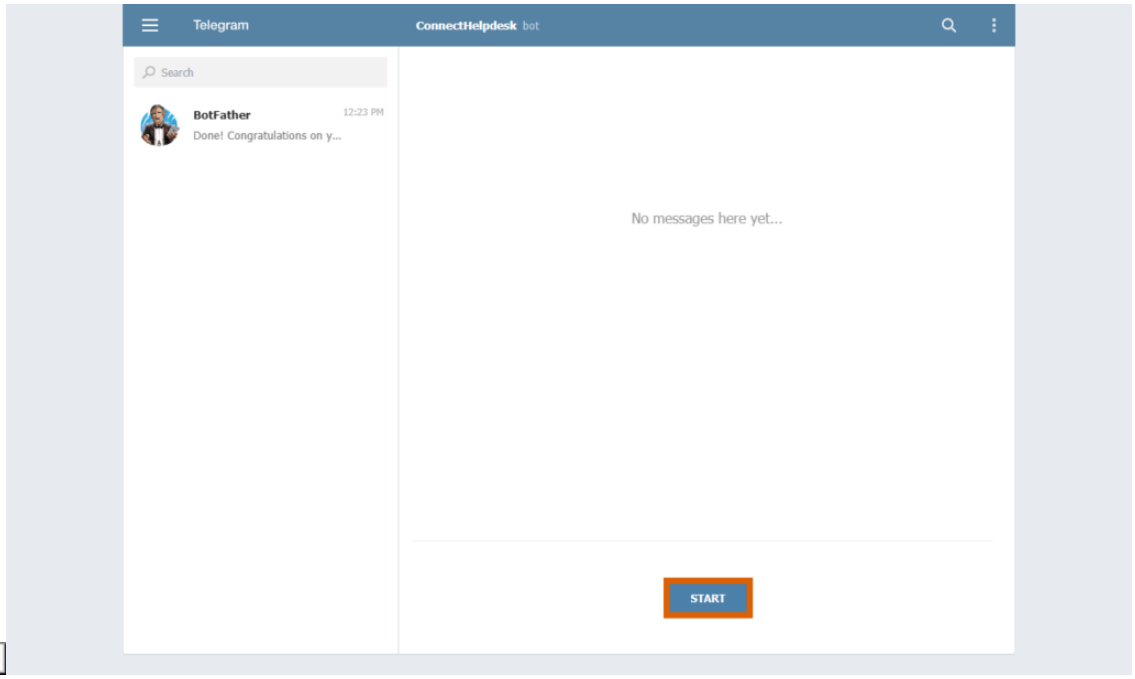

1. Access @BotFather from your created Telegram account.

2. Click the **Start** button to initiate your bot creation.

3. Use the `/newbot` command to create your new bot:

- Name your bot by sending a message with your required bot name.
- Choose a username for your bot. Note that your bot username should be unique and *@BotFather* can ask you to specify another username.

4. When *@BotFather* provides a link to your bot, launch your bot by accessing the provided link and clicking the **Start** button.

Therefore, your bot will be successfully created and launched. Note that *@BotFather* also sends an **access token** (API Key) of your created bot. Since this token is crucial for the following operations, make sure to copy this token and keep it secured.

Bot Configuration

Configure your created Telegram bot so that it can provide generated Case comments to your selected recipients. Furthermore, it is necessary to create a group and add there required recipients. Follow the steps below to configure your created bot.

1. Create a **group** on Telegram. Add your bot and required recipients as group members.

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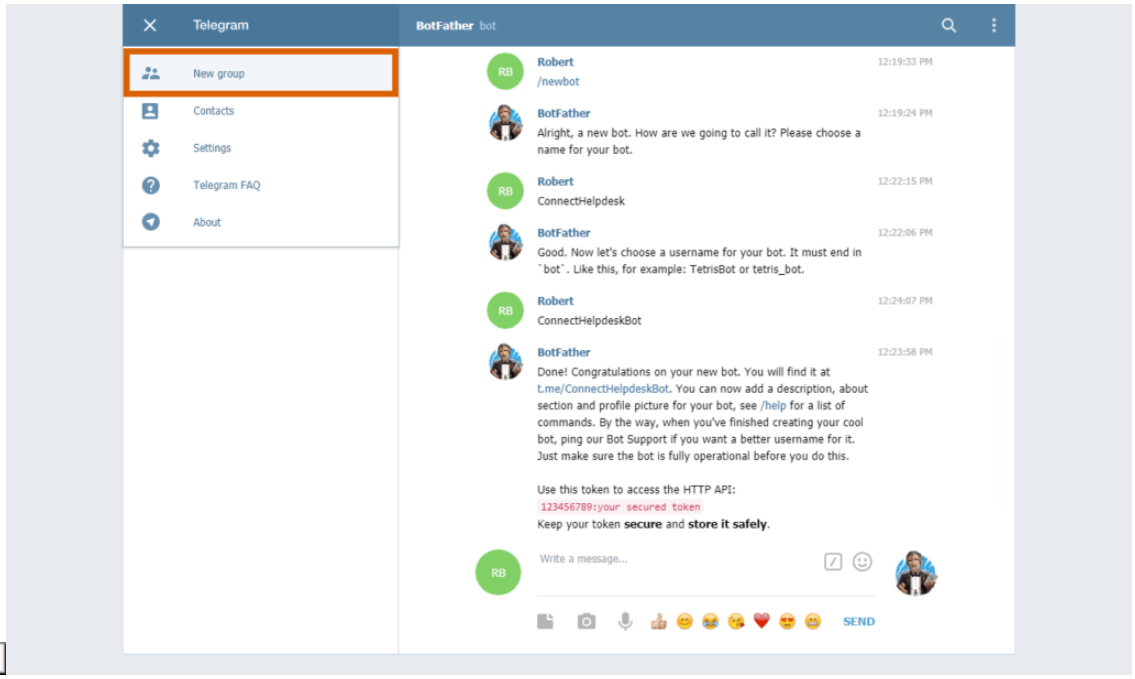

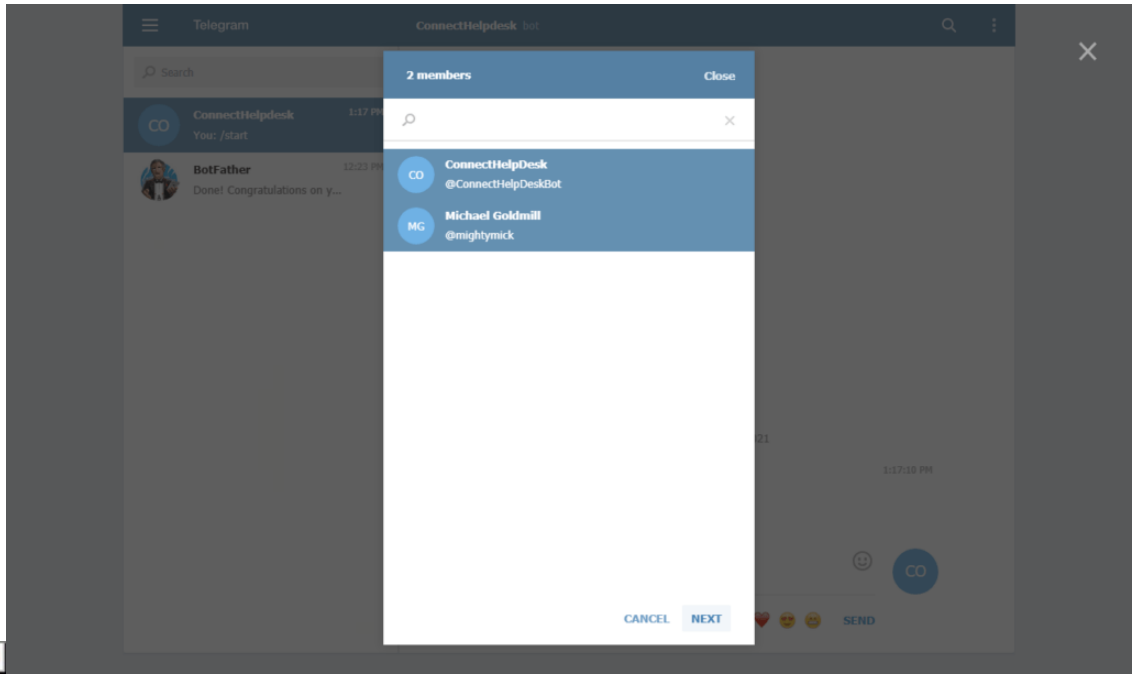

2. Access your telegram `chat ID` via the following **GET** request:

`https://api.telegram.org/bot<api_key>/getUpdates`

Use your bot API key that is received from *@BotFather*.

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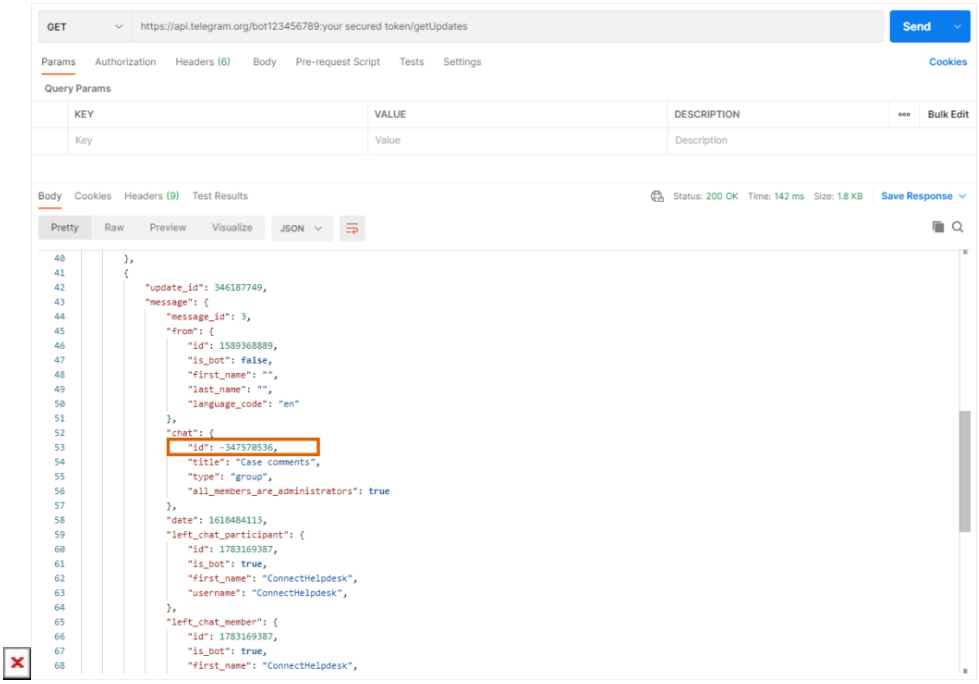

No Results

In case the provided request returns no results, make sure that your bot is added to your created group. Furthermore, ensure that only one *bot* is presented there. If there are several bots in your created group, the system could also return no results.

It is possible to use a web browser for this call. However, it is recommended to use Postman or other REST Clients to locate your **chat ID** faster. Make sure to copy your chat ID and keep it secured.

Zapier Integration

Create a new *Zap* on the Zapier platform and integrate the Helpdesk module to the Telegram message system. Therefore, your created bot will provide new Case comments to your created chat and added recipients. Follow guidelines below to successfully integrate the Helpdesk module to Telegram.

Trigger

Configure your **Zap trigger** as follows:

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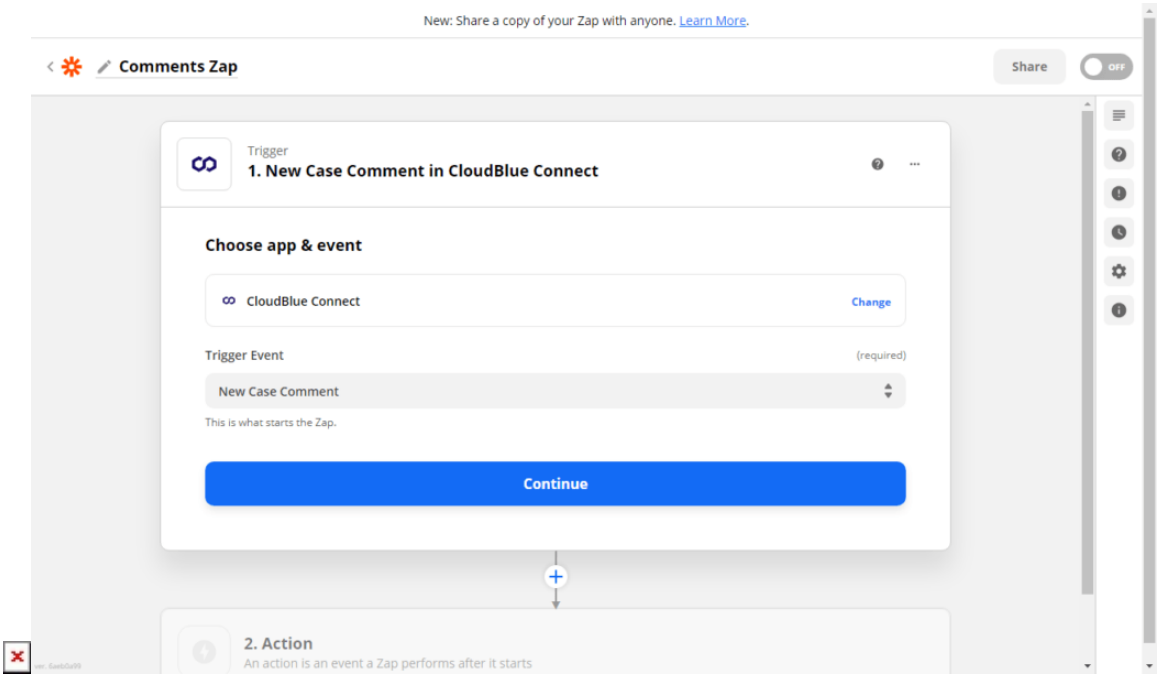

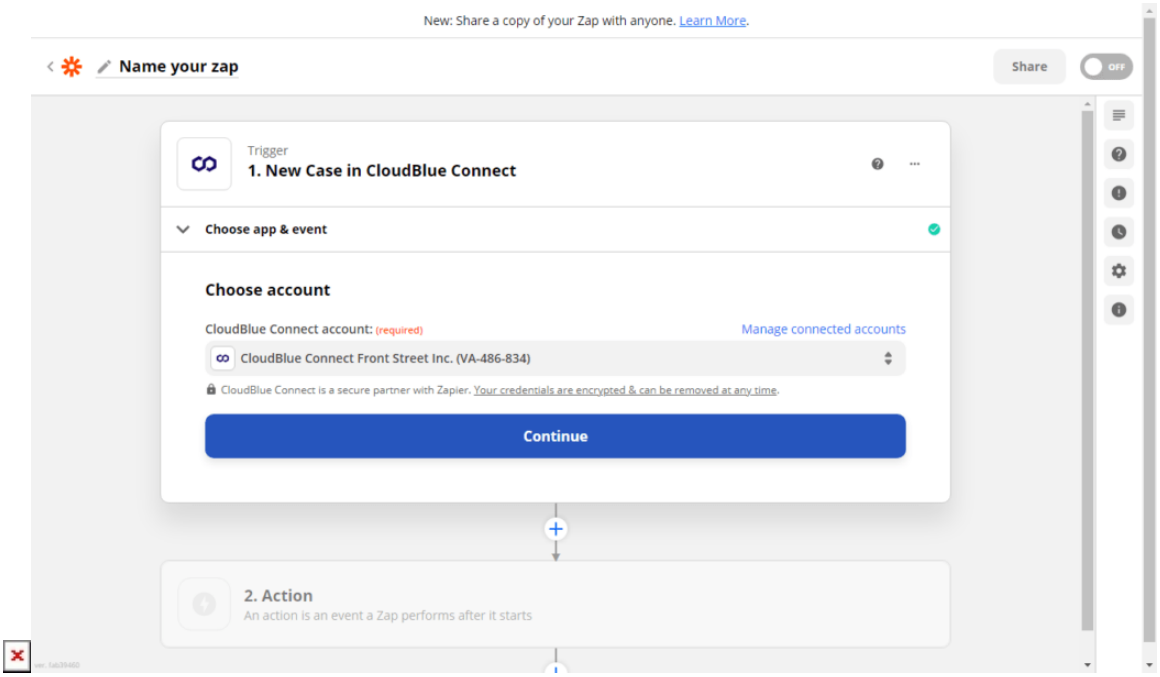

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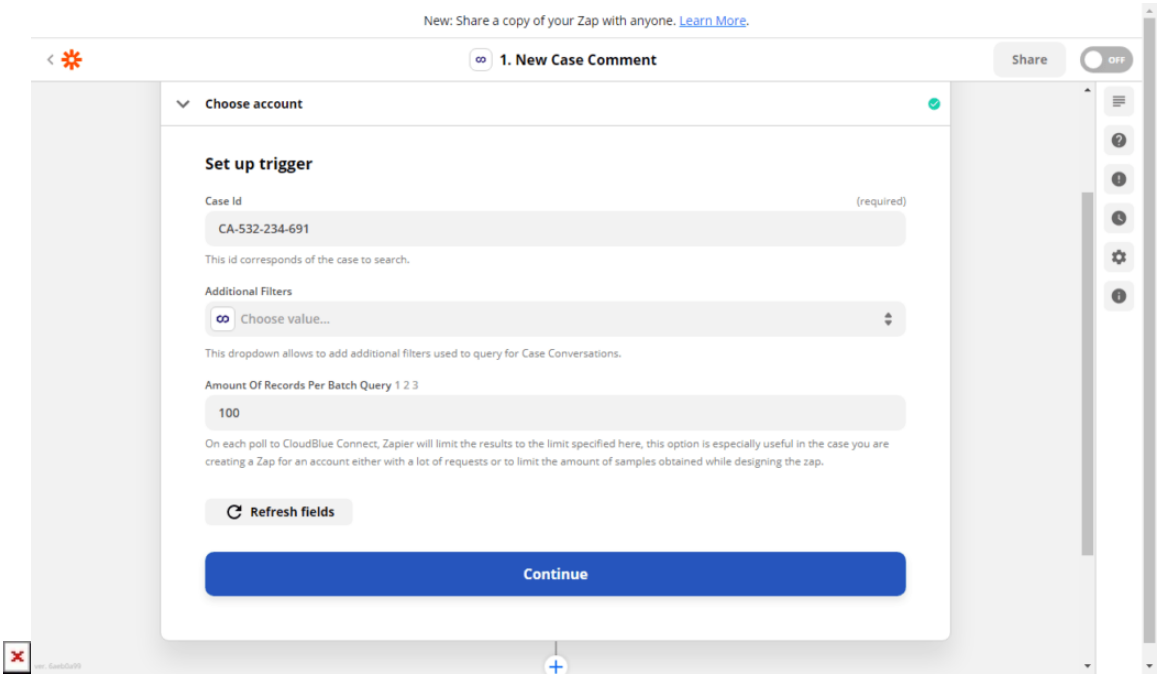

1. Fill out app and event trigger form:

- **App**: Select the *CloudBlue Connect* platform as your *App Event*. Make sure that this application is connected within the *MyApps* section on the Zapier platform.
- **Trigger Event**: Select the *New Case Comment* event from the list.

2. The system asks you to specify your Connect account. Ensure that a correct account is selected and click **Continue**.

3. Paste your *Connect Case ID* to the **Set up trigger** form. Click **Continue** to test out your trigger and proceed to the Action configuration.

> Select Case with a comment
>
> Make sure that your specified Case have at least one comment. Otherwise, Zapier will display a corresponding error during your trigger test.

Action

Configure your **Zap action** as follows:

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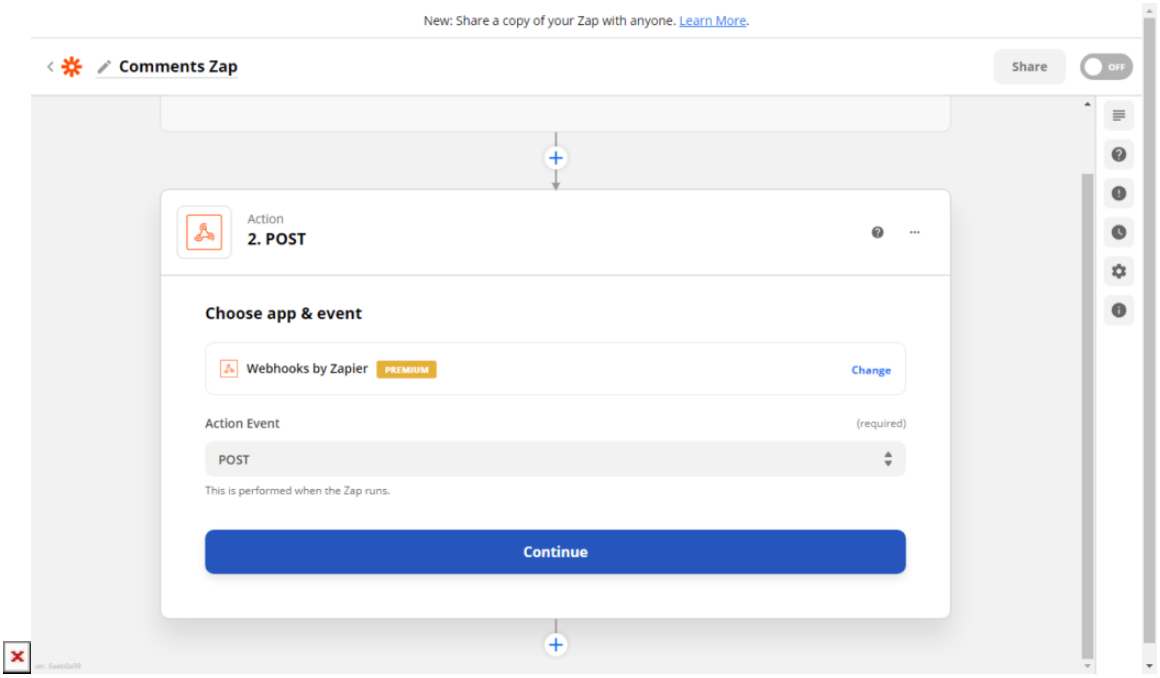

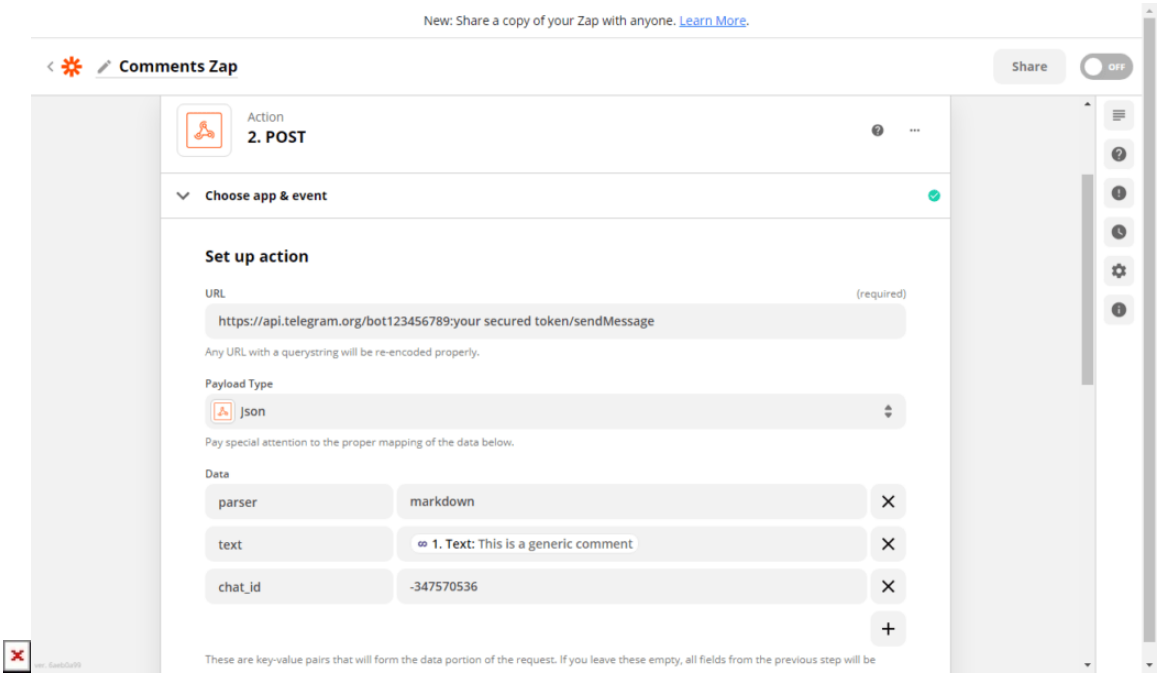

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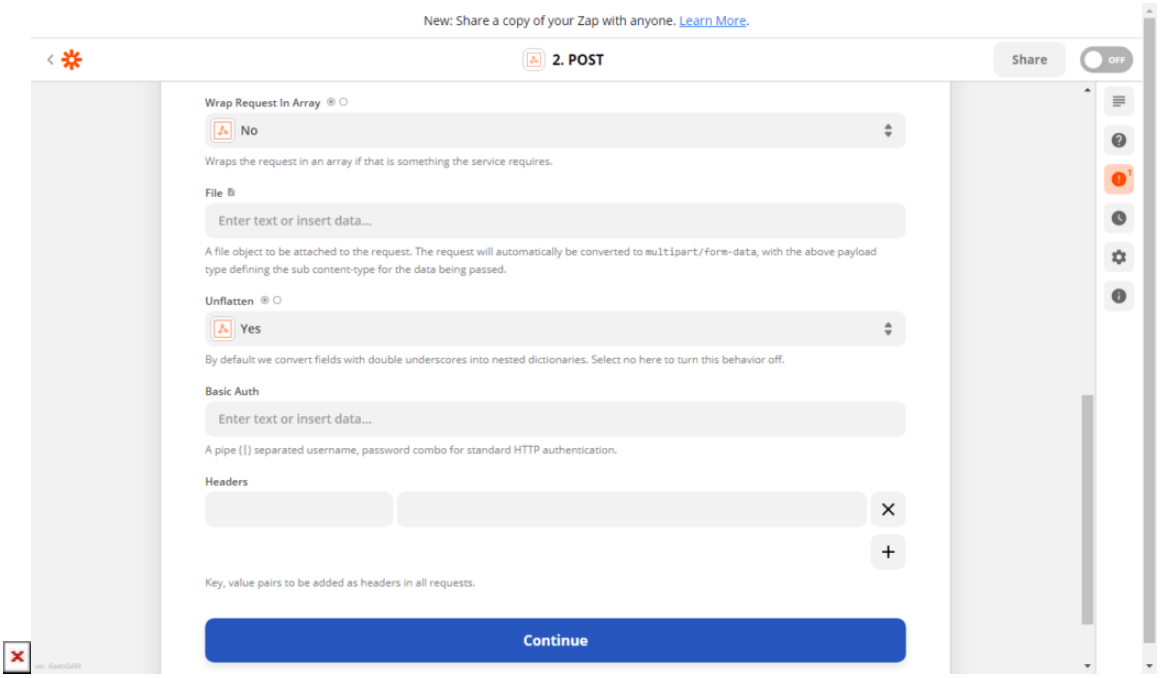

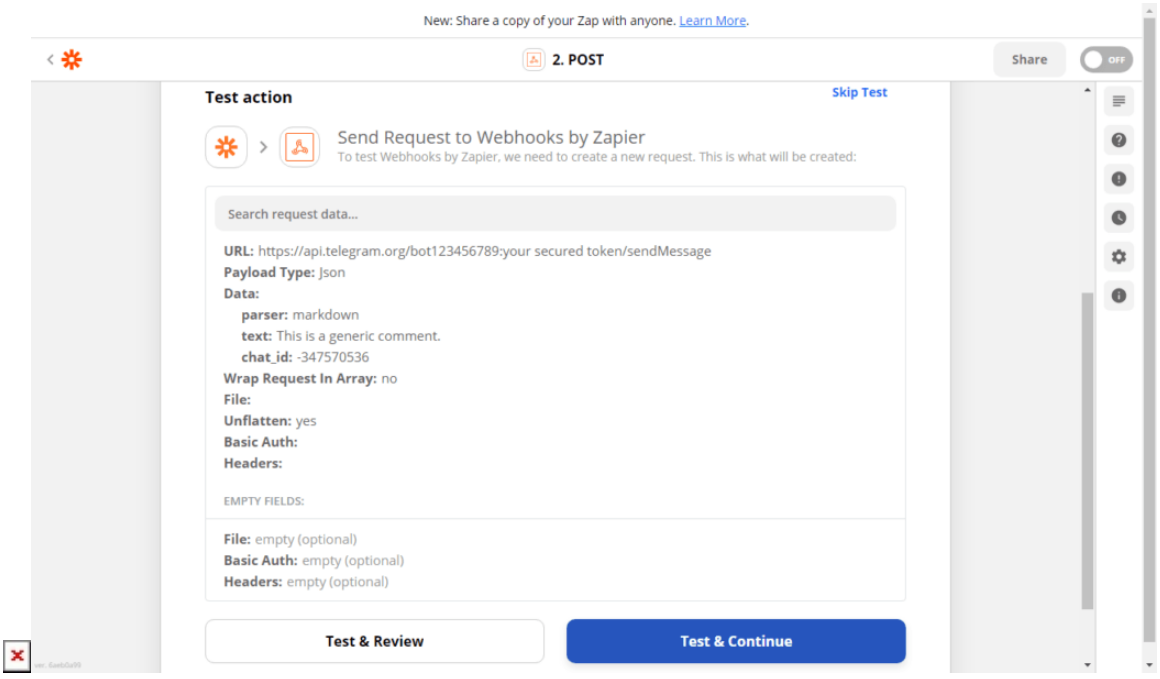

1. Fill out app and event action form:

- **App**: Select *Webhooks by Zapier* from the application list.
- **Action Event**: Choose the *POST* request from the provided list.

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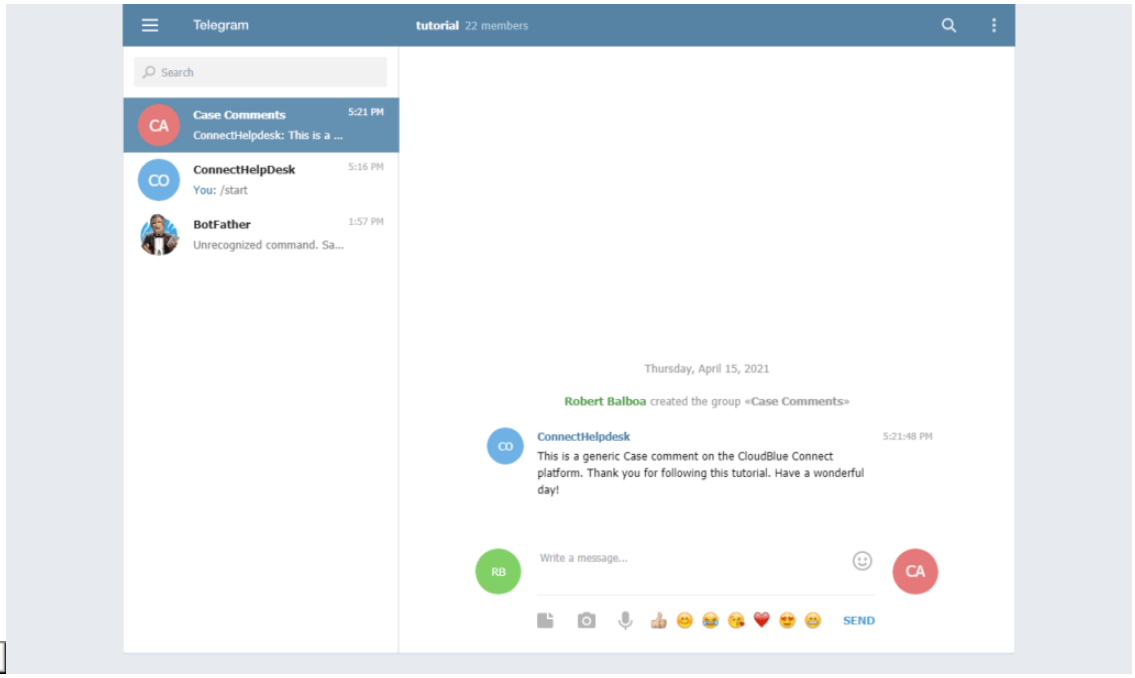
2. Set up your Zap action via the following form:

- **URL**: Paste the following URL into this field – `https://api.telegram.org/bot<api_key>/sendMessage`
- **Payload Type**: Select *JSON* payload type.
- **Data**: Specify additional data fields as presented below:
  - **parser**: Add the following parser – `markdown`
  - **text**: Insert the *Text* tag into this field.
  - **chat_id**: Paste your acquired *chat ID*.

3. Test your specified action to finalize your *Zap* creation. As a result, your created bot should send a Case comment to your Telegram group.

Therefore, the Helpdesk module integration to an instant message service will be successfully completed. Your created bot will provide your Telegram group with new generated Case comments.



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