



[How-to] Integrate with Zendesk Help Center for Zendesk Legacy Sunshine customers

This PDF outlines how to successfully integrate your AssetSonar account with the Zendesk Help Center for streamlined request management.

Before you proceed, enable **Zendesk Sunshine** in your Zendesk account, as the Zendesk Help Center integration is built on it. You must also have **AssetSonar's Zendesk** integration enabled.

Please note that only the customers with access to Zendesk Legacy Sunshine can use the integration.

Let's get started.

1. Enable Zendesk Help Center integration

The first step is to enable the Zendesk Help Center integration in your AssetSonar account. To do this, go to **Settings** \rightarrow **Add Ons** \rightarrow **Integrate Zendesk** and select the 'Integrate with' Zendesk Help Center' option.

Integrate Zendesk						
Connect Zendesk with AssetSonar to link items with your service desk tickets, end users and agents. Learn more						
Enabled - Connected with Zendesk at	endesk.com. Click here for troubleshooting.					
Disabled						
Your Subdomain with host: ramification.assetsonar.	com					
Your Secret Key:)10	Dd5					
Zendesk Alert Requester	Select Requester					
Zendesk Assignee	Select Assignee					
IMPORT ZENDESK TICKETS						
View reports of Zendesk tickets (i)						
✓ Integrate with Help Center						
Allow Staff Users to link items to Zendesk ticket	s. (j)					

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sales@ezo.io

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Click 'Proceed' and hit 'Update.'

You will get the following message upon successful integration.



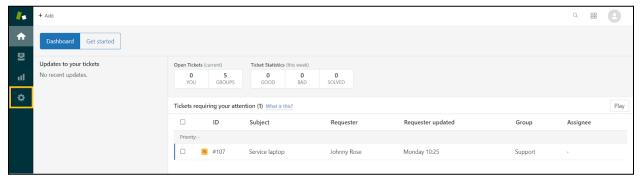
Zendesk Help center integration has been enabled.

2. Configuration in Zendesk Support

Now, you need to configure the Asset field and preferred ticket forms in your Zendesk Support account so they can appear to end-users on the Zendesk Help Center portal when they submit requests.

2.1. Create Ticket Field

In your Zendesk Support account, click on the 'Admin' icon as shown.





From the sidebar, go to $Manage \rightarrow Ticket Fields$.

Click on the 'Add Field' on the top right.

+ Add				Q ==	e
ADMIN HOME	Ticket Fields				
Overview	Ticket fields contain all ticket data, such as subje- agents and end users. Learn more 12	ct, description, and priority. Add and mana	ge ticket fields to customize y	our ticket forms for	
APPS	Search ticket fields	Filters ~		⊥ Add fiel	d
Marketplace 🖻 Manage	Active Inactive				
MANAGE	Title ≎	Field ID ≎	Туре ≎	Date modified 🗘	:
People User Fields	Assignee System field	360020259959	Drop-down	2021-04-18	*
Organization Fields	Group System field	360020259939	Drop-down	2021-04-18	
Brands Views	Priority System field	360020259919	Drop-down	2021-04-18	
Macros	Type System field	360020259899	Drop-down	2021-04-18	
Tags Ticket Fields	Status System field	360020259879	Drop-down	2021-04-18	
Ticket Forms Contextual Workspaces	Description System field	360020259859	Multi-line	2021-04-18	
Dynamic Content	Subject System field	360020259839	Text	2021-04-18	•

Now, add a text-based Asset field as illustrated, and hit 'Save'.

	+ Add							Q		
♠ ⊒	ADMIN HOME	< Asset / Text Learn more [2]								ĺ
٥	APPS Marketplace (2 Manage	Drop-down ©	Multi-select	T Text ©	Multi-line	Checkbox				
	People	#	.0	[==]		*				
	User Fields Organization Fields	Numeric ①	Decimal ①	Date	Credit card	Regex				
	Brands Views	Description								
	Macros Enter an optional description C									
	Ticket Fields Ticket Forms	Permissions								
	Index Forms Permissions Contextual Workspaces Agent only Dynamic Content Editable for end users Field can be edited by the end user when submitting a request. Read-only for end users									
	CHANNELS	kead-only for end t	isers							• 1
ZK	Email	Preview					Cancel	Sav	ve 🗸	

Note: Select the 'Editable for end users' option under the Permissions section.

Copy the Field ID of the Assets field for further steps.

gents and end users. Learn more 🛽			
Search ticket fields	Filters ~		<u>↓</u> Add
Active Inactive			
Title 🗘	Field ID 🛇	Туре 🗘	Date modified \Diamond
Priority System field	360020259919	Drop-down	2021-04-18
Type System field	360020259899	Drop-down	2021-04-18
Status System field	360020259879	Drop-down	2021-04-18
Description System field	360020259859	Multi-line	2021-04-18
Subject System field	360020259839	Text	2021-04-18
Redmine #	360020135040	Text	2021-04-18
Туре	360020135060	Drop-down	2021-04-18
Customer Type	360020135080	Drop-down	2021-04-18
Assets	360020135080	Text	2021-04-18

The newly created Assets field will enable you to pull IT Asset information from AssetSonar to Zendesk Help Center forms.

2.2. Create Ticket Forms

Now, create custom Ticket Forms for end-users to place requests on the Zendesk Help Center portal.

Ticket Forms can be used to place requests for use cases including but not limited to:

- Troubleshooting and configuring issues in IT Assets
- Servicing hardware components
- Installing software on selected IT Assets





To create a new Ticket Form, go to Man	hage \rightarrow Ticket Forms \rightarrow Add Form.
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4.	+ Add		Q	9
€ D]	ADMIN HOME Overview	Ticket Forms A ticket form determines the fields and data a ticket contains. Ticket forms can include system fields and any custom fields you create. You		
ul ¢	APPS	can create multiple ticket forms. For example, you might create different forms for different products. In that case, end users choose the appropriate form to submit a request. Learn more IB End user instructions		
	Manage	Text shown to end users when multiple forms are available Please choose your issue below		
	MANAGE			- 1
	People User Fields Organization Fields	Q. Search ticket forms Filters Active Inactive		
	Brands Views			
	Macros	Default Ticket Form Default		- 1
	Tags Ticket Fields	New form Agent only		
	Ticket Forms Contextual Workspaces Dynamic Content			

Name the form and drag and drop relevant fields to it. Remember to add the Assets field to your Ticket Forms and make the forms editable by end-users!

1.	+ Add				Q 8		9
↑ 5	Tags Ticket Fields Ticket Forms Contextual Workspaces Dynamic Content	Request Form Form Gitable for end users Enable end users to select this form when submitting a ticket. Title shown to end users					Î
¢	CHANNELS	Request Form					
	Email Twitter Chat		۵	Available ticket fields Add fields from here to the ticket form.			
	Facebook Talk	ii = Description System field	A	Q. Search ticket fields			
	Text Widget API	ii Ț Assets	×	Customer Type +			
	Mobile SDK Channel Integrations	II System field	×	T Redmine # + ☑ Type +			
	BUSINESS RULES	ii V Type System field	×				
	Routing Triggers Automations						
ZK	Service Level Agreements Rule Analysis Answer Bot				Cancel	Save	

Hit 'Save' once done.

Note: For the integration to work, only the Ticket Forms with the Assets field embedded in them can be used.





3. Editing code in Zendesk Help Center

The next step is to edit the theme's code within the Zendesk Help Center.

Note: We recommend creating a sandbox instance in your Zendesk account to test the code changes before you implement them.

Learn more about creating a sandbox here.

3.1. Clone the live theme

Traverse to the Zendesk Guide platform from the Products icon, as shown.

-	+ Add		۹ 🖬 🛽
•	Tags •		Support
8	Ticket Forms	Ticket Forms A ticket form determines the fields and data a ticket contains. Ticket forms can include system fields and any custom fields you create. You	
al	Contextual Workspaces Dynamic Content	can create multiple ticket forms. For example, you might create different forms for different products. In that case, end users choose the appropriate form to submit a request. Learn more 🗅	a Guide
		appropriate form to submit a request, cean more a	Gather
¢	CHANNELS	End user instructions Text shown to end users when multiple forms are available	● Chat
	Email	Please choose your issue below	• • • • • • • •
	Twitter		€ Talk
	Chat Facebook	Q. Search ticket forms Filters	▲► Explore
	Talk Text		
	Widget	Active Inactive	Sell
	API		
	Mobile SDK	Default Ticket Form Default	Admin Center
	Channel Integrations	·	

This leads you to the Zendesk Help Center knowledge base. Click on the 'Guide Admin' button at the top.

Add ~	Guide admin	88	^
Community Ray Adin			1
FAQ Announcements			





Now, click the 'Customize' icon in the sidebar.

1	Add	icles > Lists			🕼 Help Center 🔠 💽
QØ.	Lists	History	All articles		Save search as list
Ę0	All articles	5	5 results	Filters ~	
= ©	Published	5	L		
*	O Drafts		Title What are these sections and articles doing here?	Last edited ♀ 8 hours ago	:
۵	⊕ Archived		How do I publish my content in other languages?	8 hours ago	
			How can agents leverage knowledge to help customers?	8 hours ago	
			How do I customize my Help Center? Welcome to your Help Center!	8 hours ago 8 hours ago	

This directs you to the Themes page. You can clone the currently live theme within your Zendesk Help Center account by clicking the ellipsis icon and selecting 'Copy.'

Â	Add ~				😨 Help Center 🛛 🔠 💽
QØ	Themes Start with the Zendesk standard theme, buy a the Learn about themes ¹²	me from one of our partners, or import your own	L.	Add theme \sim	•
=	In just a few steps, yo	nter Marketplace themes u can look your best with a new Help Center ther		×	
 ● ▲▲ 	Try out themes be Keep everything of		k partners	Show me	
۵	Live theme				
x	Incomposed of the second of th	Customize			

You can now take action on the live theme clone.

3.2. Edit the cloned theme

Now that you've copied the live theme, you can change it and preview the copy for testing purposes.





To edit the copied theme, click on 'Customize' as shown below.

Follow the pathway: *Edit Code* \rightarrow *Access Code*.

1	Add ~			Help Center	8 B
90 191	Copenhagen (2.9.0)	Templates: Home page ~		Community 💿 Ramiah Adeer	n •
=	< Back				
۲	Colors				
24	Fonts				
٥	Brand		Q, Search		
	Images				
	Search settings				
	Home page elements	-			
	Article page elements	·			
	Section page elements	·	EAQ Announcement	s	
	Community post elements	>			
	Community topic elements	·			_
X				Edit code S	ave

This shall lead you to the Templates folder.

The Zendesk Help Center integration requires you to add a code in three primary files from the given templates:

- New_request_page.hbs
- Request_page.hbs
- Document_head.hbs

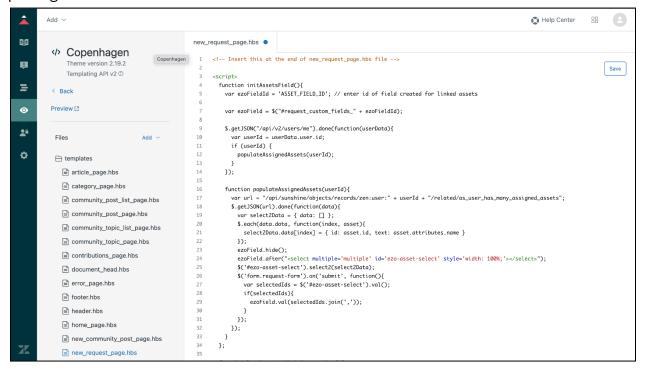




Add \sim 👔 Help Center 8 88 Words: 35 Chars: 609 印 new_request_page.hbs Openhagen 1 Ę. Save Templating API v2 ① Ξ < Back 0 Preview [2] 20 Files Add Ф 😑 templates article_page.hbs category_page.hbs community_post_list_page.hbs community_post_page.hbs Community topic list page.hbs community topic page.hbs contributions_page.hbs document_head.hbs error_page.hbs 🖹 footer.hbs 🖹 header.hbs home_page.hbs new_community_post_page.hbs
 new_request_page.hbs 74 new_request_page.hbs

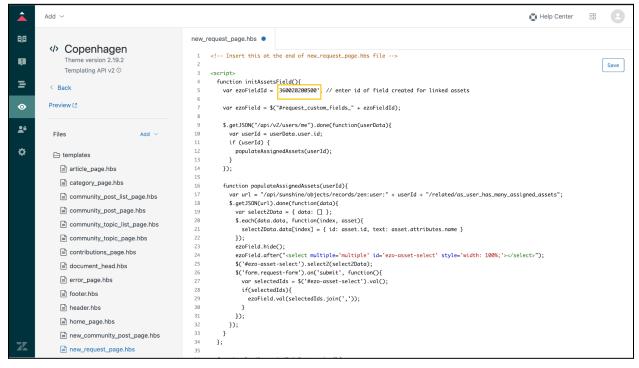
From the left sidebar, open the new_request_page.hbs file.

Paste the code given in this <u>link</u> at the end of this file. This is how your file will look after pasting the code.





Enter the numerical value of the Field ID you noted from Section 2.1. in place of ASSET_FIELD_ID within the code and hit the 'Save' button.



Now, open the request_page.hbs file for editing.

4	Add \sim				📑 Help Center	8
88	V> Copenhagen	new_request_page.hbs	request_page.hbs			
ų,	Theme version 2.19.2 Templating API v2 ①	1				Save
=	< Back					
۲	Preview 🖾					
2 0	ategory_page.hbs					
¢	community_post_list_page.hbs					
Ť	 community_post_page.hbs community_topic_list_page.hbs 					
	community_topic_page.hbs					
	contributions_page.hbs					
	document_head.hbs					
	🖹 error_page.hbs					
	🖹 footer.hbs					
	🖹 header.hbs					
	home_page.hbs					
	new_community_post_page.hbs					
	new_request_page.hbs					
	request_page.hbs					
	requests_page.hbs					
	🖹 search_results.hbs					
X	section_page.hbs					





Paste the following code given in this link.

In the code you just pasted, enter the following values:

- In place of ASSET_FIELD_ID, add the Asset Field ID value from Section 2.1.
- In place of SUBDOMAIN, enter your AssetSonar subdomain with the host.

Click' Save' when you're done.

Now, open the last file, i.e., document_head.hbs.

1	Add \sim			🚺 Help Center	
QØ	↔ Copenhagen	new_request_page.hbs • request_page.hbs •	document_head.hbs		
Ø	Theme version 2.19.2 Templating API v2 ①	1 2			Save
=	< Back				
٥	Preview [2				
2 ª	Files Add ~				
۵	🕒 templates				
	article_page.hbs				
	category_page.hbs				
	community_post_list_page.hbs				
	community_post_page.hbs				
	community_topic_list_page.hbs				
	community_topic_page.hbs				
	contributions_page.hbs				
	document_head.hbs				
	error_page.hbs				
	🖹 footer.hbs				
	🖹 header.hbs				
	home_page.hbs				
	new_community_post_page.hbs				
ZK	new_request_page.hbs				

Paste the code given in this <u>link</u> at the end of the document_head.hbs file and hit 'Save'. You are now ready to preview changes.



3.3. Preview the edited theme

Click the 'Preview' button in the code editor.

This opens the preview in a new tab.

1	Add \sim	🔁 Help Center 🛛 🙁					
qp Qp	Copenhagen Theme version 2.19.2 Templating API v2 ①	Introducing custom pages × Now you can create pages with custom URLs for your help center. × Learn about custom pages [2]					
=	< Back	document_head.hbs • new_request_page.hbs • request_page.hbs ×					
٥	Preview 🗗	1 <div class="container"> 2 <div class="request-breadcrumbs">{{breadcrumbs}}</div></div>					
* *	document_head.hbs error_page.hbs	<pre>4 <hl class="request-title">{{request.subject}}</hl> 5</pre>					
٥	i footer.hbs	<pre>- div id="main-content" class="request-container"> - <section class="request-main"> - </section> - <section class="request-main"> - <section class="request-main">- <section class="request-main">- <section class="request-main">- </section>- </section>- </section>- </section>- </section>- </section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></section></pre>					
	🖹 header.hbs	<pre>8 {{satisfaction}} 9 <ul class="comment-list"></pre>					
	home_page.hbs	<pre>10 {{#each comments}} 11 <\i id="{{anchor}}" class="comment"></pre>					
	new_community_post_page.hbs	11 «(1) Go (Gassi Comment >) 12 «div (Gassi Comment >)					
	new_request_page.hbs	13 <div class="comment-info"></div>					
	request_page.hbs	<pre><div class="comment-author"> <div class="avatar comment-avatar"></div></div></pre>					
	requests_page.hbs	17 <pre><svg <="" focusable="false" height="12" pre="" viewbox="0 0 12 12" width="12" xmlns="http://www.w3.org/2000/svg"></svg></pre>					
	search_results.hbs	<pre>class="icon-agent" aria-label="{{t 'team_member' name-author.name}}"></pre>					
	section_page.hbs	18 <pre>cpath fill="currentColor" d="M6 0C2.7 0 0 2.7 0 6s2.7 6 6 6 6-2.7 6-6-6.7.6-6-6.5.00 2c1.1 0 2 .9 2 2s9 2-2 2- 29-2-2 .9-2 2-2.5.0 04335C3.9 7.6 4.9 7 6 7s2.1.6 2.6 1.5c.1.2 0 .53.5.2"/></pre>					
	subscriptions_page.hbs	19					
	user_profile_page.hbs	20 {{/if}}					
		<pre>21 22 </pre>					
	script.js	23					
	🖹 style.css	24 <div class="comment-meta"></div>					
		<pre>25 </pre>					
72	Assets - 0 Bytes/25 MB	<pre>26 {{#link 'user_profile' id=author.id}} 27 {{author.name}}</pre>					
		27 {{author.name}} 28 {{//inkl}					

Select 'End user' from the Preview role dropdown.

Templates: Home page 🗸	Preview role: End user Y	Help Center is in Preview mode. Close preview.
3	Anonymous	Community Submit a request 💽 Ray Adin 🗸
	End user	
-	Agent	
	Admin	
		Q, search
		FAQ Announcements
		Community Join the conversation





Now, select the Request Page and New Request Page from the Templates dropdown to test the changes from an end user's perspective.

Section page		Community Submit a request 🕘 Ray Adin ~
Article page		
Contributions page		THE STATE OF
Following page		11 See .
Request list page	🗰 🗰	
Request page	Q. Search	
New request page		
Search results		
Error page		
Community topic list page		
	FAQ	Announcements

As you can see, the Assets field has been populated on the New Request page.

Submit a request
Please choose your issue below
Request Form *
Subject
Description
T B <i>I</i> :≡ :≡ ⊠ & ² ⊠ 99
Please enter the details of your request. A member of our support staff will respond as soon as possible.
Asset (optional)
× Asset # 26 - HP Pavillion
Attachments (optional)
Add file or drop files here

EZO offers innovative asset intelligence and management solutions, trusted by thousands of organizations worldwide.



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The Assets field is also populated on the Request page.

Templates: Request page ∀ Preview role: End user ∀ Help Center is in Preview mode. Osee preview.					
Requests Contributions Following					
7vali-sandbox > My advibes	Tvas-sandoox > My activities				
Laptop not working					
Ray Adin a feur secondi ago	Requester	Ray Adin			
	Created Last activity	Today at 16:02 Today at 16:02			
Some issue with the battery. Needs to be replaced					
	ld Status	#111 Open			
Add to conversation	Priority	-			
	Asset	731f1889-a811-11eb-b9ad- af72c98b8507			

Note: Only the assets checked out to the requesters will be visible to them when they place requests. Assets will not show up if they have been checked back in or the Zendesk Requester does not exist as a member in AssetSonar.

Once you're done testing the preview for syntax errors, click the' Close Preview' button.

Templates: Request page Y Preview role: End user Y	Help Center is in Preview mode. One preview.	*
Requests	Contributions Following	
	> My activities	

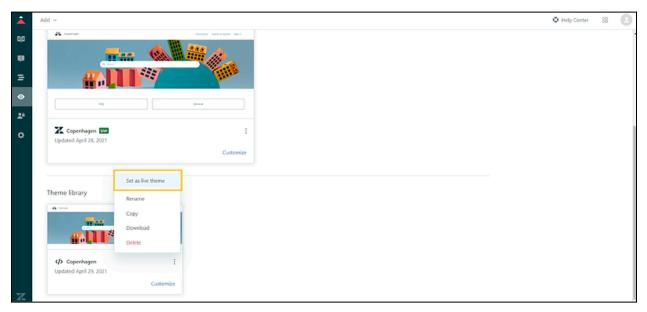




4. Publish the Zendesk Help Center theme

You can now publish the edited theme for use by end-users.

Go to *Guide Admin* \rightarrow *Customize (eye icon)* \rightarrow *Preferred theme* \rightarrow *Options (ellipsis icon)* \rightarrow *Set as live theme* to publish the finalized theme.



Once the theme has been published, it appears at the top of the page. This ensures the **integration is successful** and changes have been applied to your Zendesk Help Center account.