

## [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** → **Add Ons** → **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 ██████████.zendesk.com. Click [here](#) for troubleshooting.

Disabled

Your Subdomain with host: **ramification.assetsonar.com**

Your Secret Key: ██████████10d5

Zendesk Alert Requester

Zendesk Assignee

[IMPORT ZENDESK TICKETS](#)

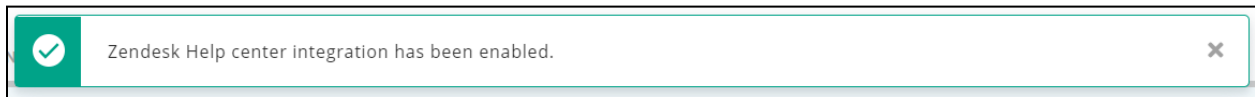
View reports of Zendesk tickets ⓘ

Integrate with Help Center

Allow Staff Users to link items to Zendesk tickets. ⓘ

Click 'Proceed' and hit 'Update.'

You will get the following message upon successful integration.

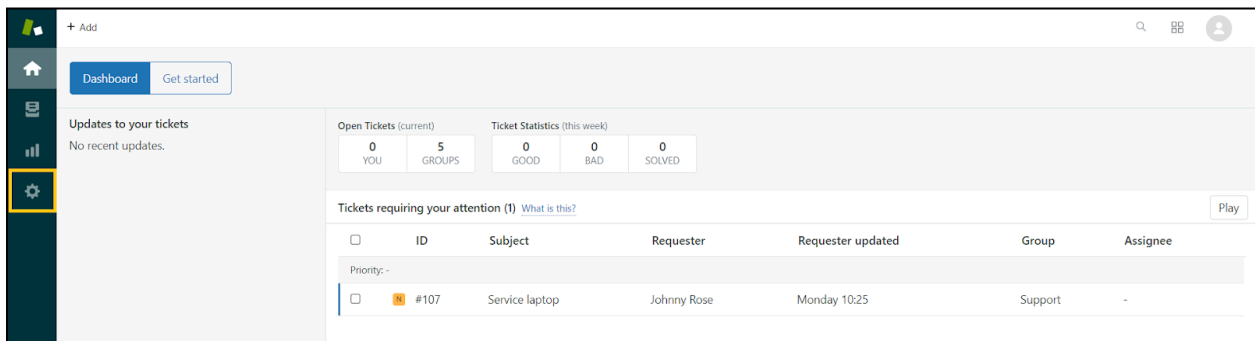


## 2. Configuration in Zendesk Support

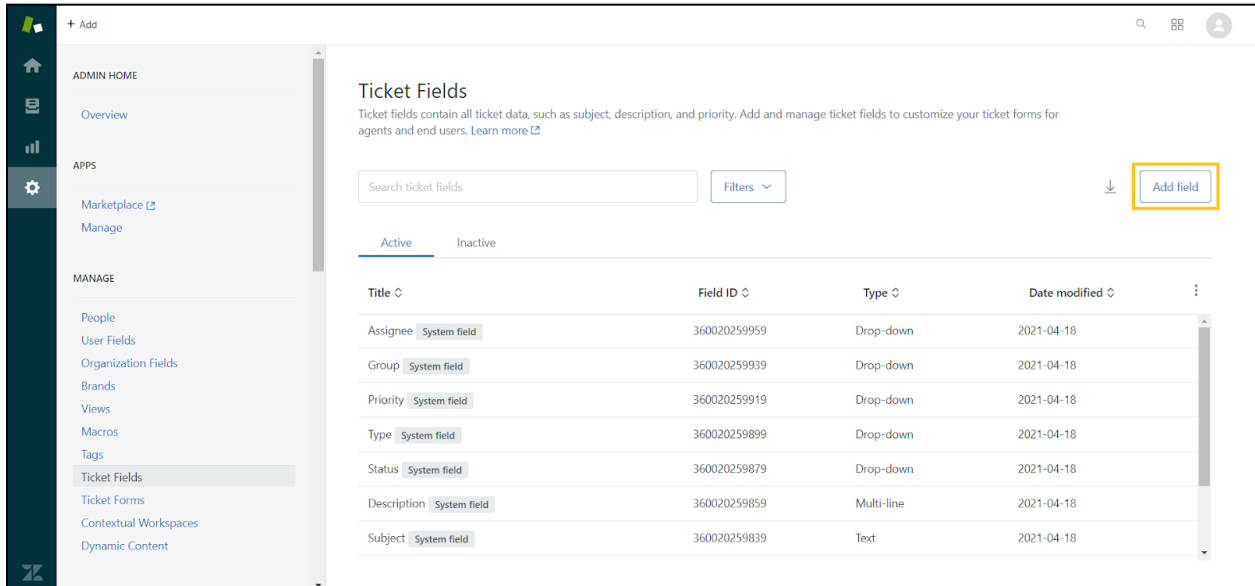
Now, you need to configure the Asset field and preferred ticket forms in your Zendesk Support account so they can appear to end-users on the Zendesk Help Center portal when they submit requests.

### 2.1. Create Ticket Field

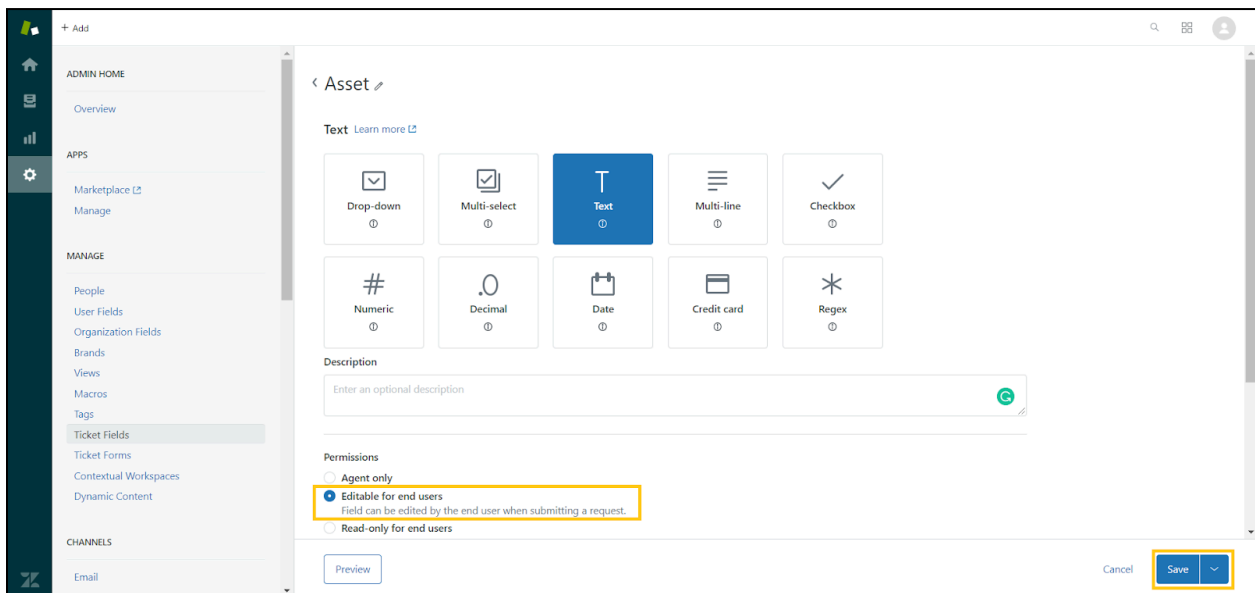
In your Zendesk Support account, click on the 'Admin' icon as shown.



From the sidebar, go to **Manage** → **Ticket Fields**.  
Click on the 'Add Field' on the top right.



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



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

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

### Ticket Fields

Ticket fields contain all ticket data, such as subject, description, and priority. Add and manage ticket fields to customize your ticket forms for agents and end users. [Learn more](#)

Search ticket fields Filters ↓ Add field

[Active](#) [Inactive](#)

Title	Field ID	Type	Date modified	
Priority <small>System field</small>	360020259919	Drop-down	2021-04-18	
Type <small>System field</small>	360020259899	Drop-down	2021-04-18	
Status <small>System field</small>	360020259879	Drop-down	2021-04-18	
Description <small>System field</small>	360020259859	Multi-line	2021-04-18	
Subject <small>System field</small>	360020259839	Text	2021-04-18	
Redmine #	360020135040	Text	2021-04-18	
Type	360020135060	Drop-down	2021-04-18	
Customer Type	360020135080	Drop-down	2021-04-18	
Assets	360020200500	Text	2021-04-28	

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

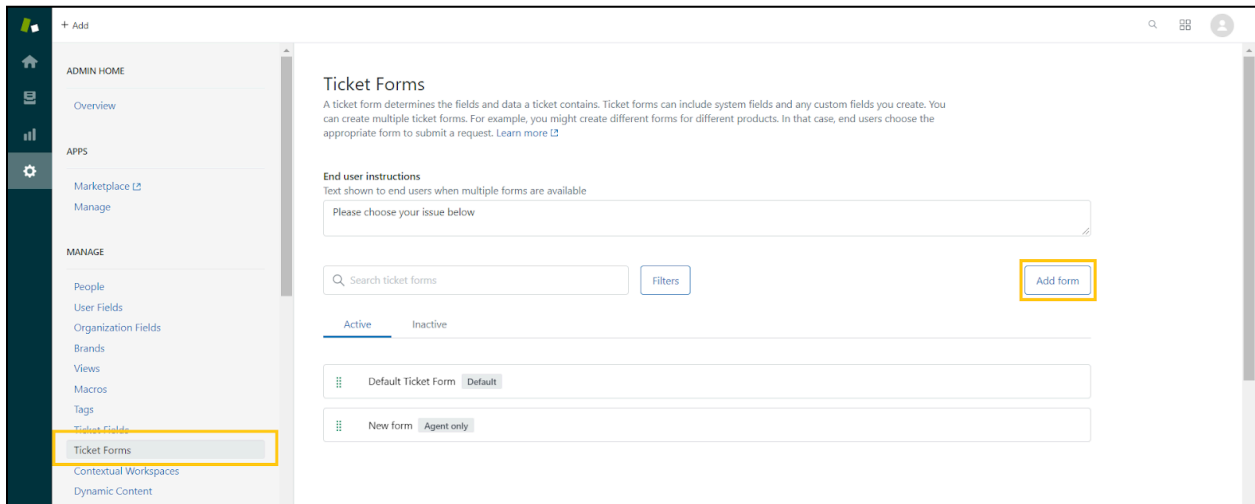
## 2.2. Create Ticket Forms

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

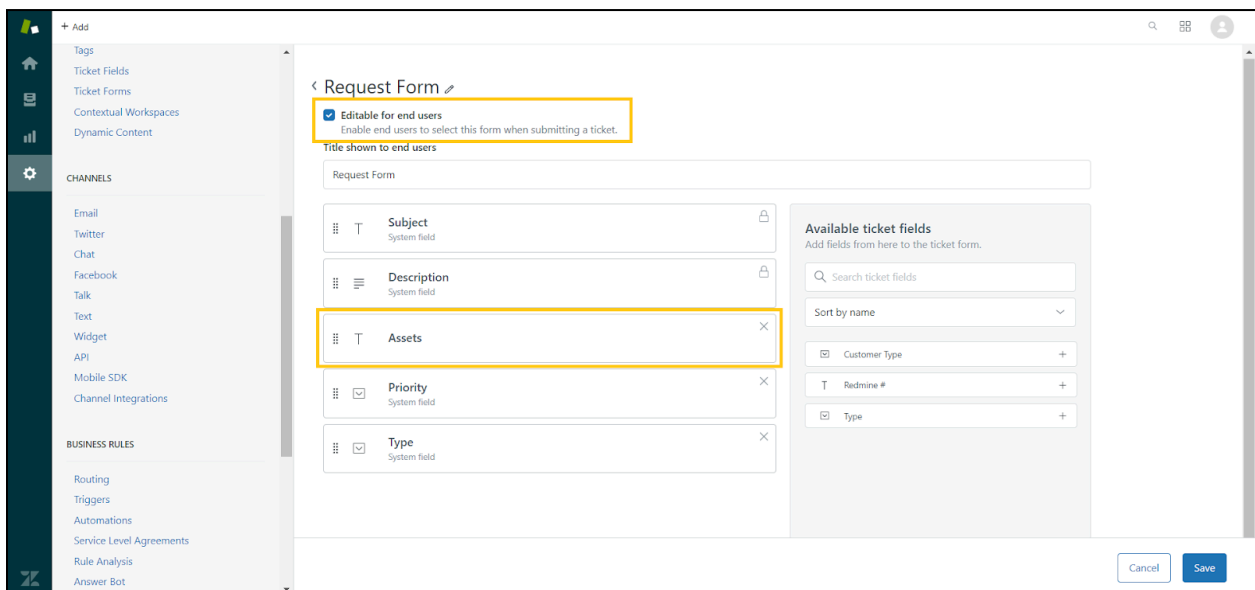
Ticket Forms can be used to place requests for use cases including but not limited to:

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

To create a new Ticket Form, go to **Manage** → **Ticket Forms** → **Add Form**.



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!



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

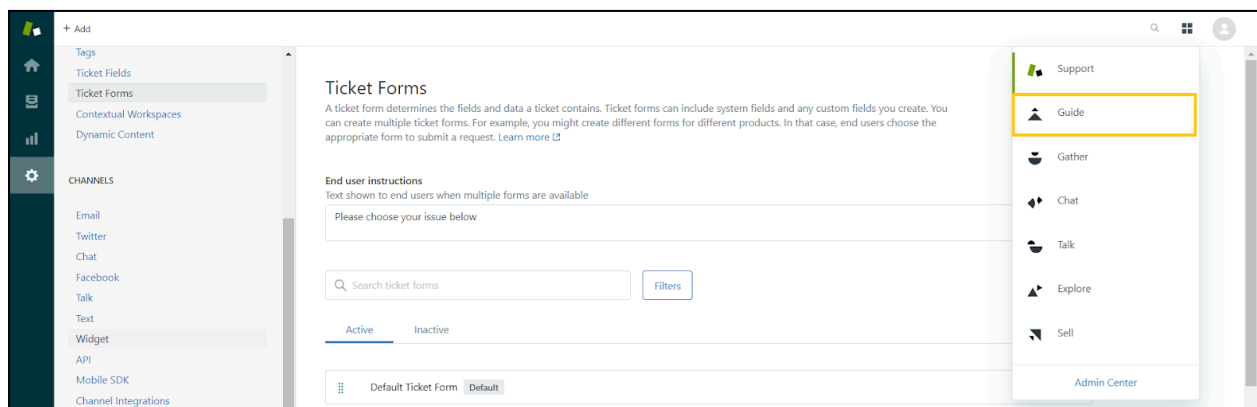
The next step is to edit the theme's code within the Zendesk Help Center.

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

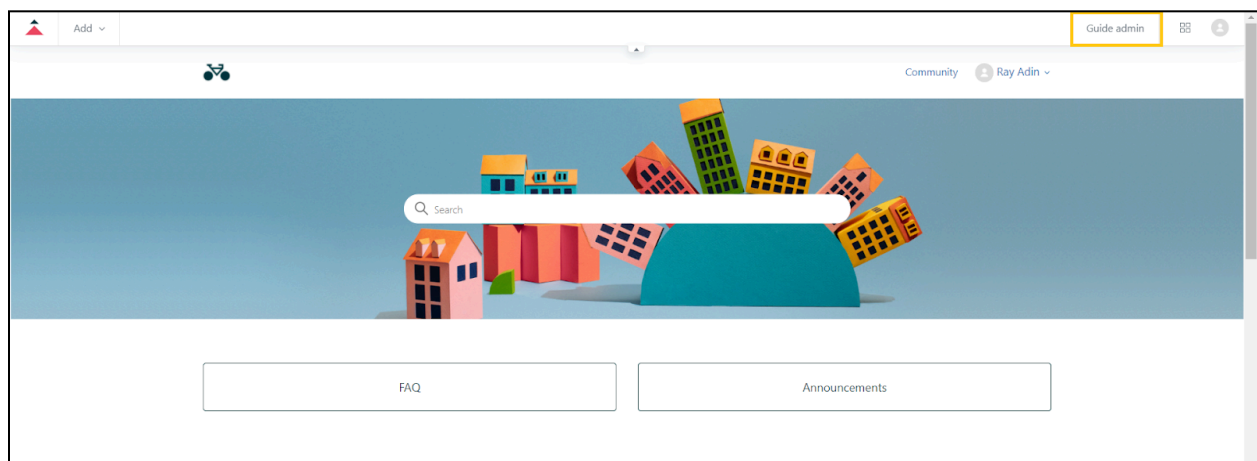
Learn more about creating a sandbox [here](#).

#### 3.1. Clone the live theme

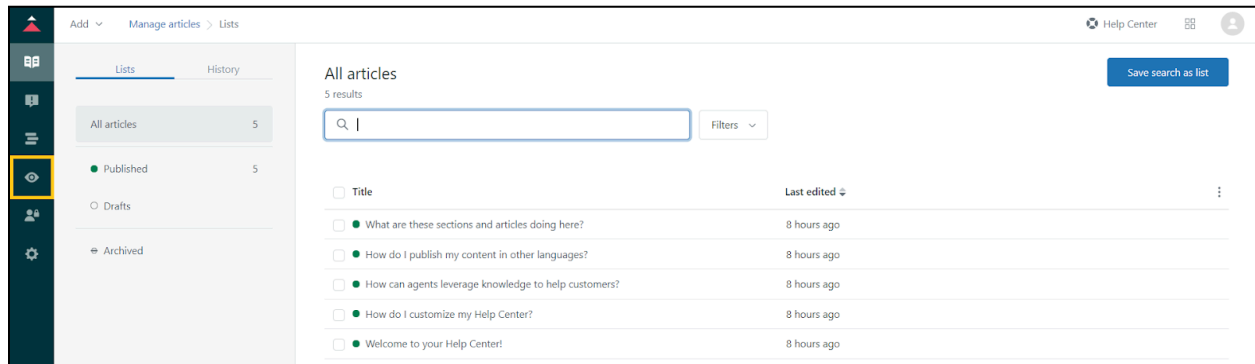
Traverse to the Zendesk Guide platform from the Products icon, as shown.



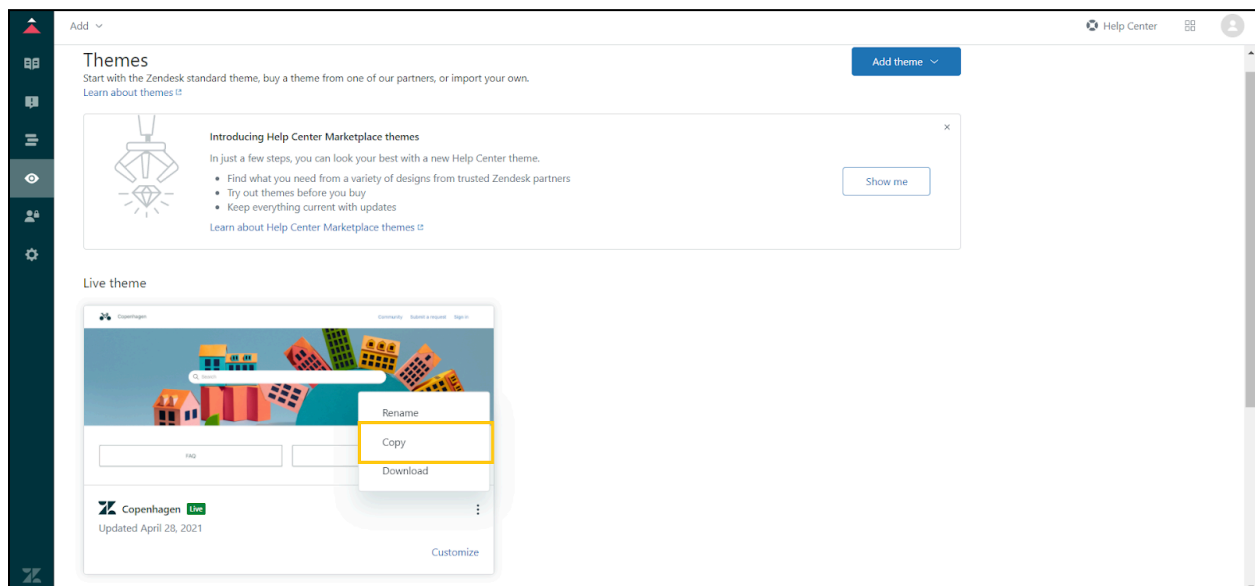
This leads you to the Zendesk Help Center knowledge base. Click on the 'Guide Admin' button at the top.



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



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.'

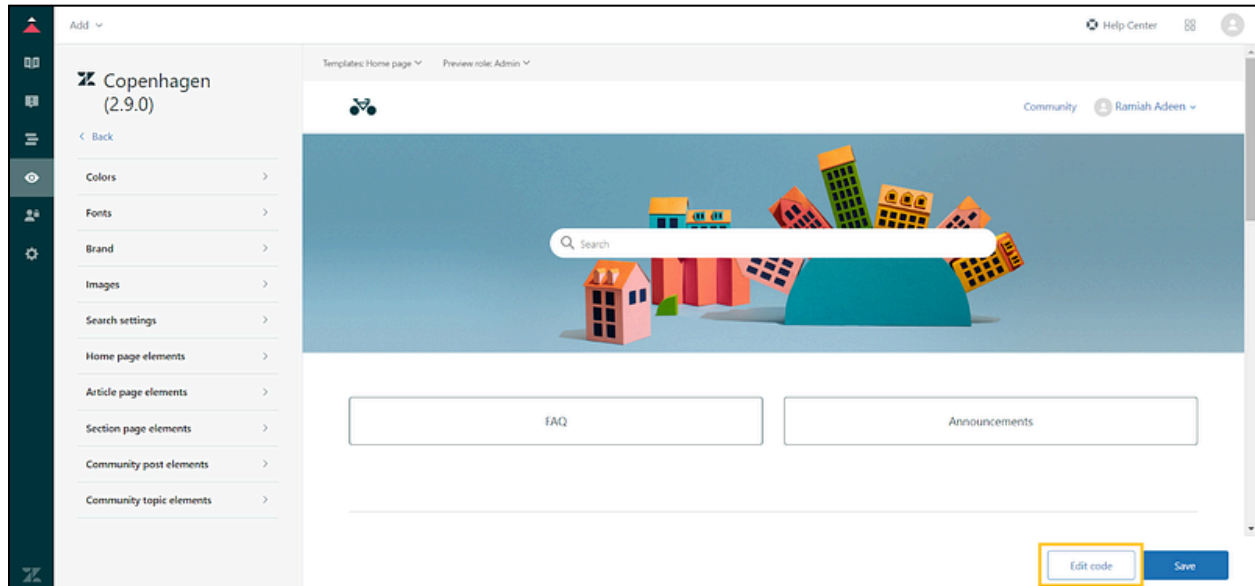


You can now take action on the live theme clone.

### 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** → **Access Code**.



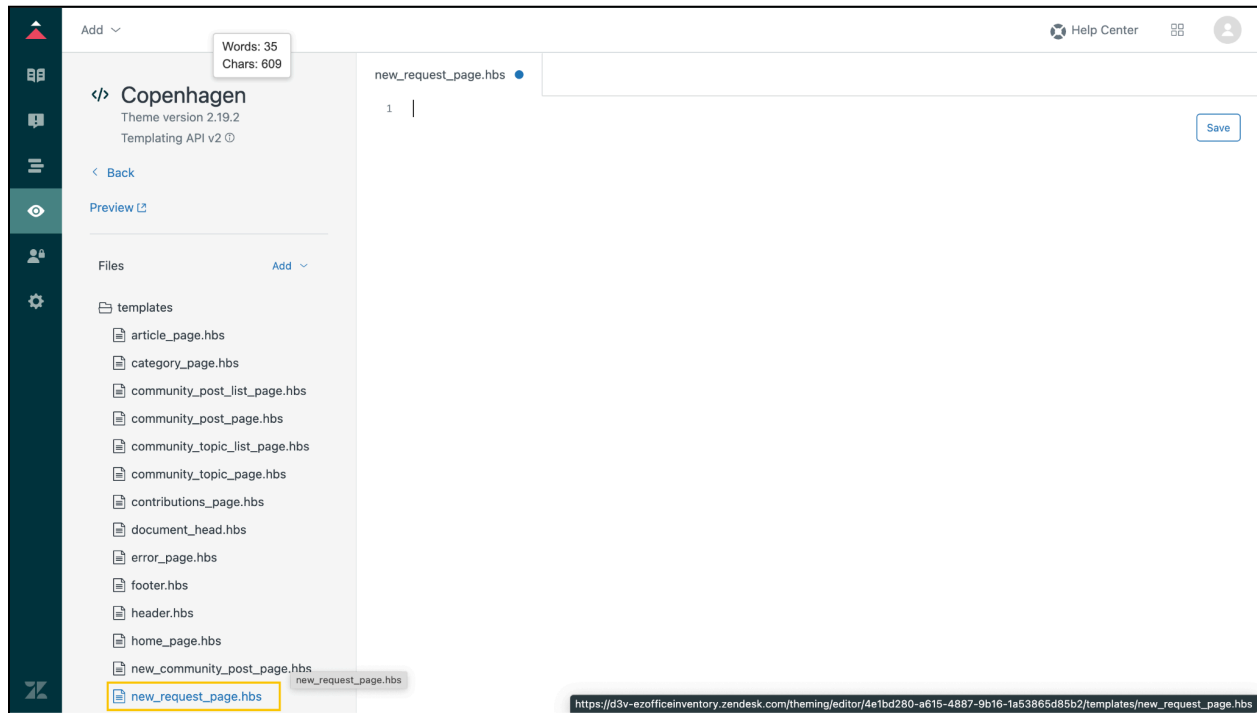
This shall lead you to the Templates folder.

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

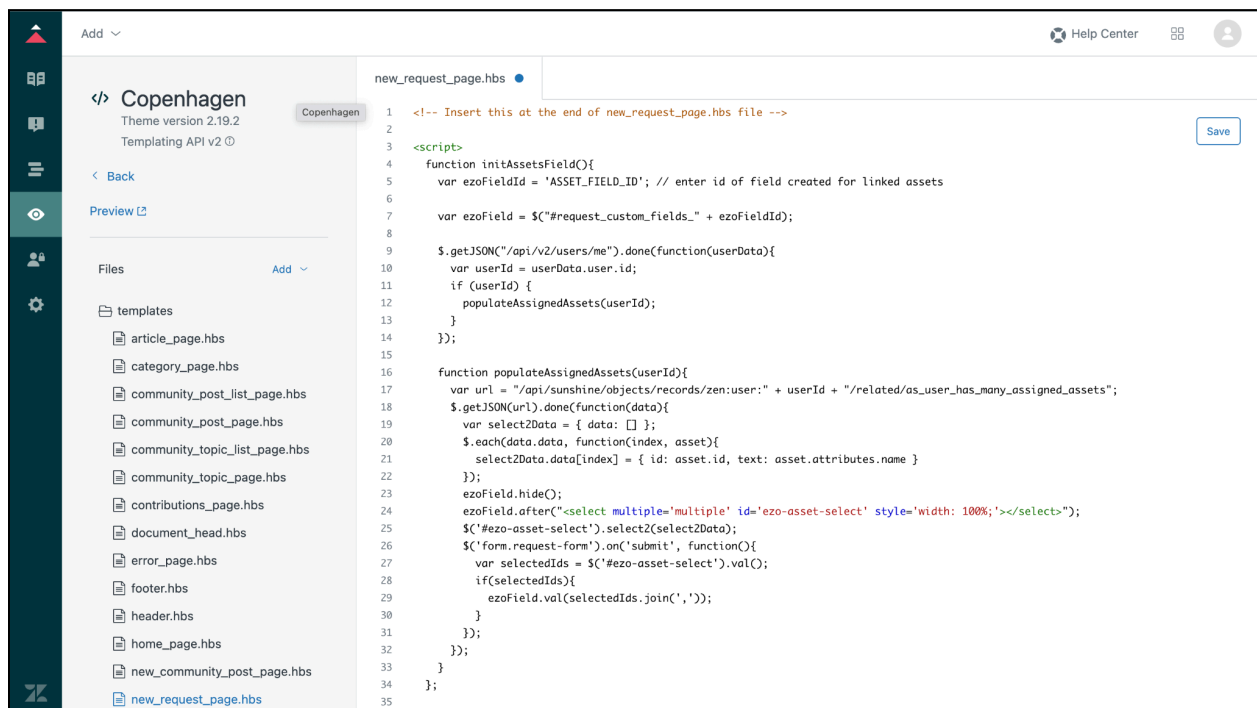
- New\_request\_page.hbs
- Request\_page.hbs
- Document\_head.hbs



From the left sidebar, open the new\_request\_page.hbs file.



Paste the code given in this [link](#) at the end of this file. This is how your file will look after pasting the code.



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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.

```

1 <!-- Insert this at the end of new_request_page.hbs file -->
2
3 <script>
4 function initAssetsField()
5   var ezoFieldId = 360020200500 // enter id of field created for linked assets
6
7   var ezoField = $("#request_custom_fields_" + ezoFieldId);
8
9   $.getJSON("/api/v2/users/me").done(function(userData){
10    var userId = userData.user.id;
11    if (userId) {
12      populateAssignedAssets(userId);
13    }
14  });
15
16 function populateAssignedAssets(userId){
17   var url = "/api/sunshine/objects/records/zen:user:" + userId + "/related/as_user_has_many_assigned_assets";
18   $.getJSON(url).done(function(data){
19     var select2Data = { data: [] };
20     $.each(data.data, function(index, asset){
21       select2Data.data[index] = { id: asset.id, text: asset.attributes.name }
22     });
23     ezoField.hide();
24     ezoField.after("<select multiple='multiple' id='ezo-asset-select' style='width: 100%;></select>");
25     $('#ezo-asset-select').select2(select2Data);
26     $('#form.request-form').on('submit', function(){
27       var selectedIds = $('#ezo-asset-select').val();
28       if(selectedIds){
29         ezoField.val(selectedIds.join(', '));
30       }
31     });
32   });
33 }
34 };
35

```

Now, open the request\_page.hbs file for editing.

```

1

```

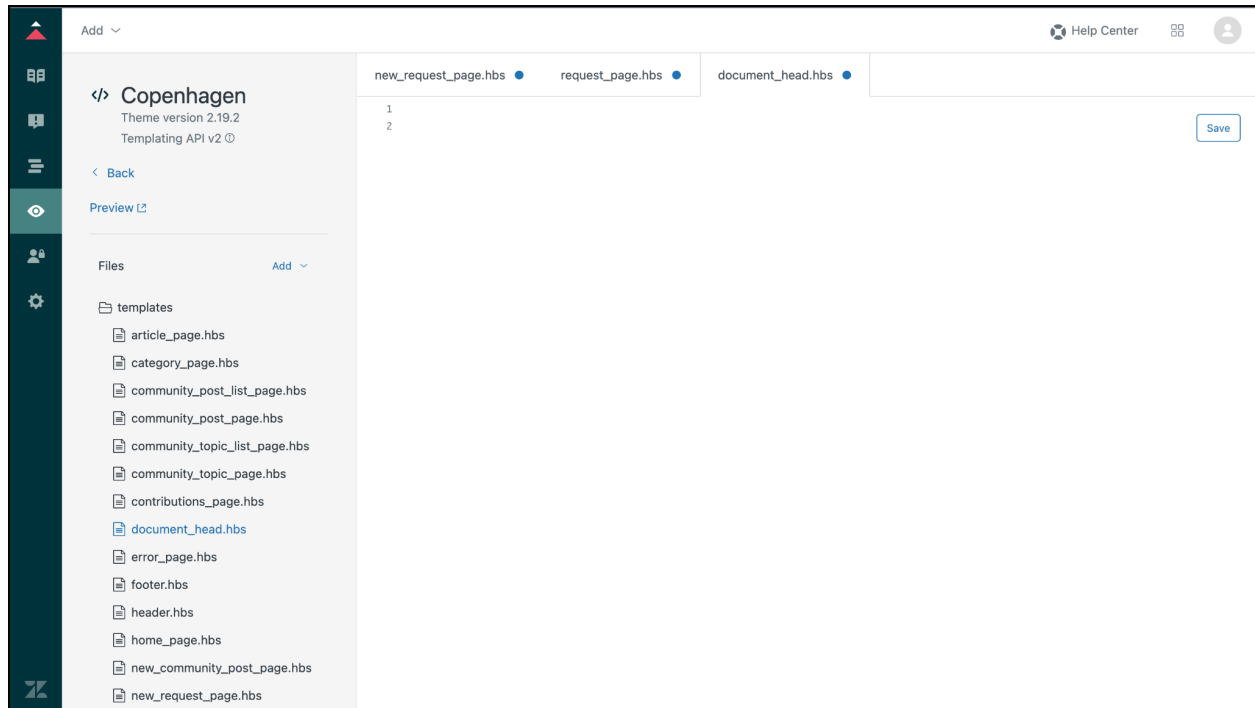
Paste the following code given in this [link](#).

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.

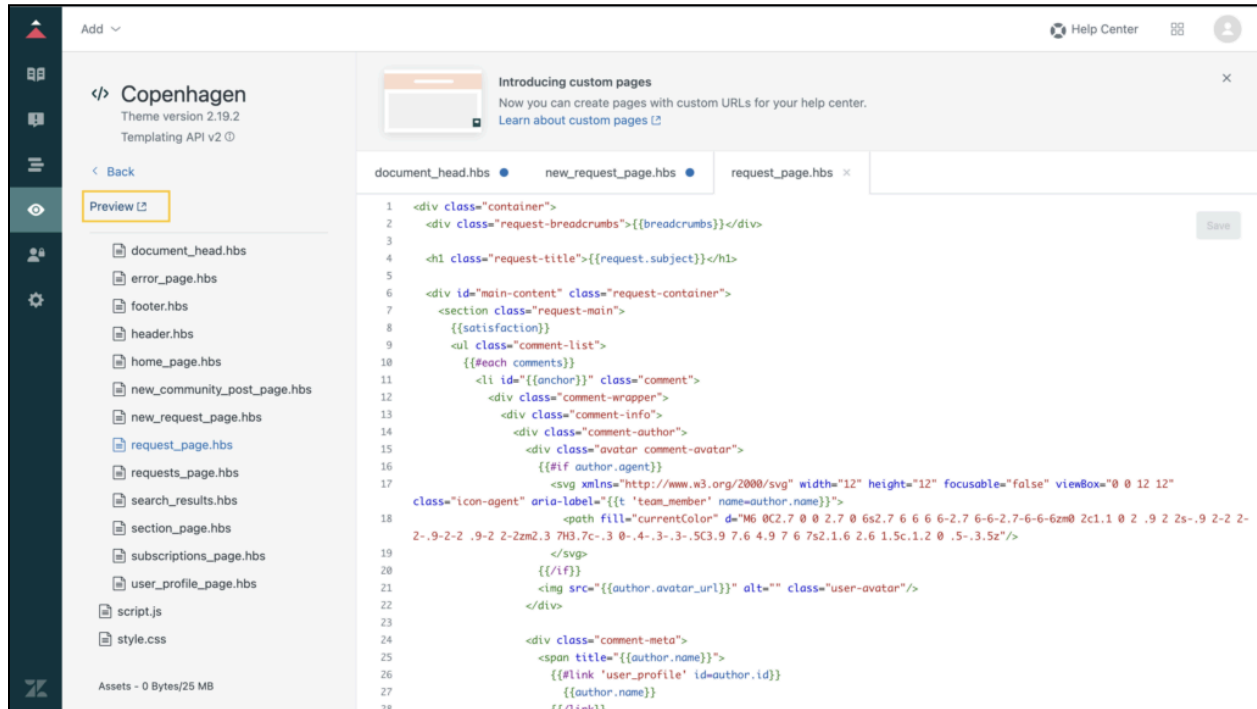


Paste the code given in this [link](#) at the end of the document\_head.hbs file and hit 'Save'.  
You are now ready to preview changes.

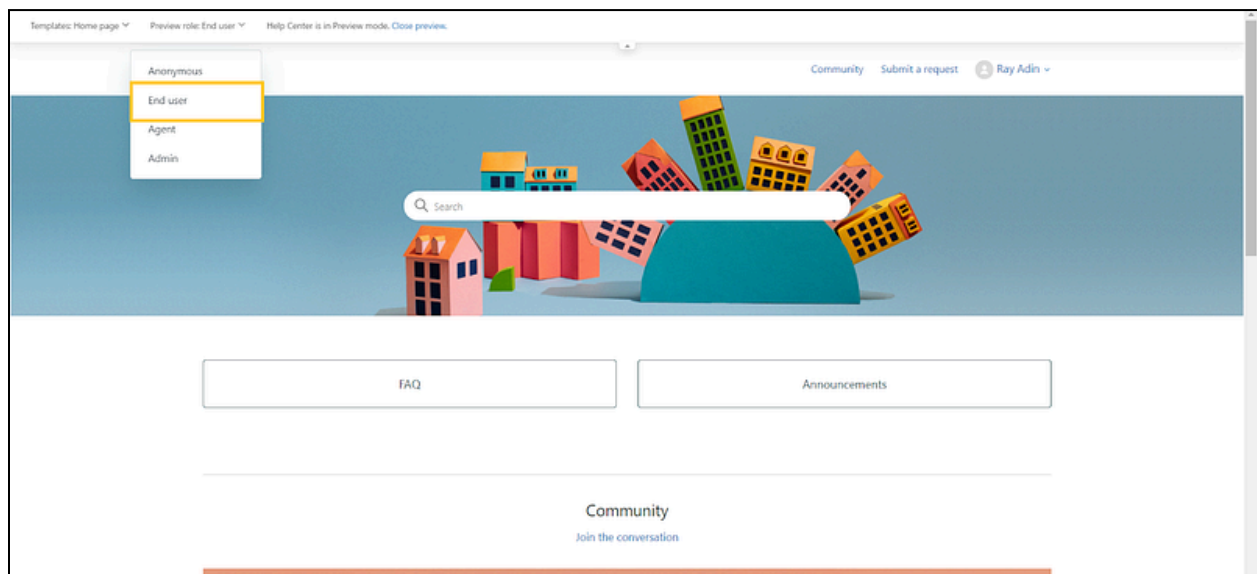
### 3.3. Preview the edited theme

Click the 'Preview' button in the code editor.

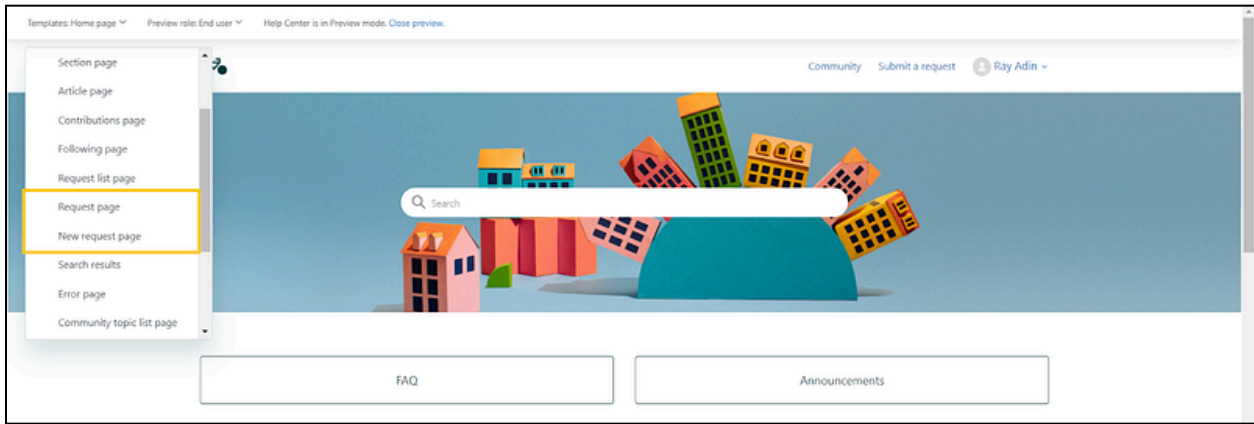
This opens the preview in a new tab.



Select 'End user' from the Preview role dropdown.



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



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

Please enter the details of your request. A member of our support staff will respond as soon as possible.

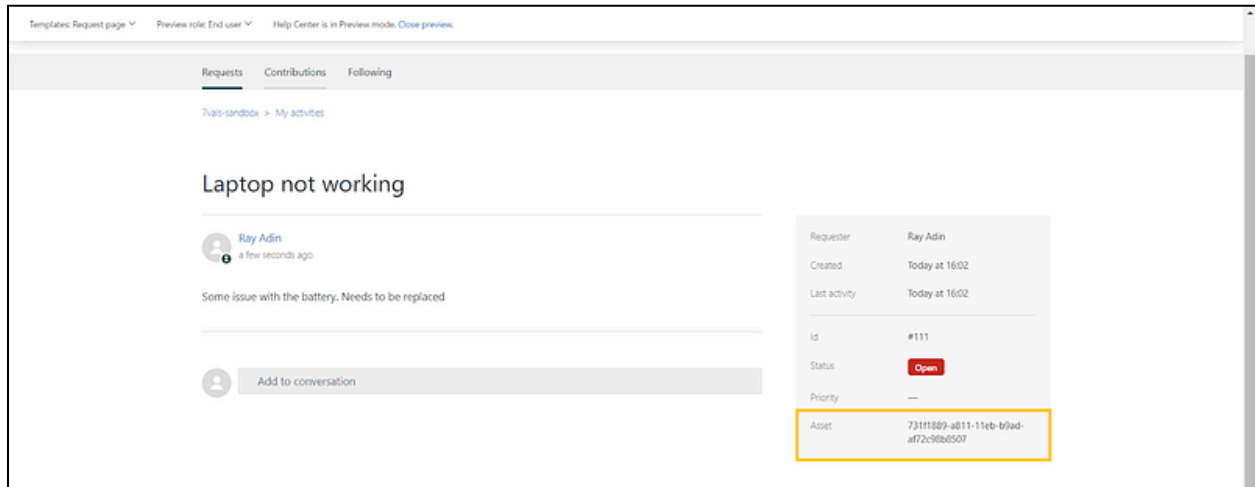
Asset (optional)

Asset # 26 - HP Pavillion

Attachments (optional)

Add file or drop files here

The Assets field is also populated on the Request page.



**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.

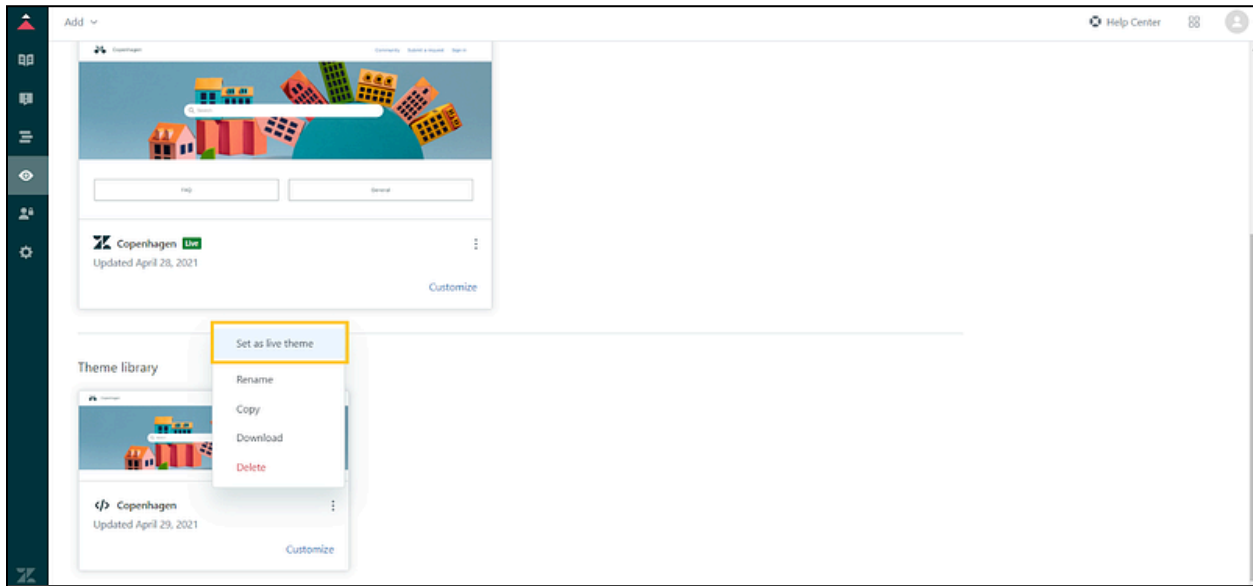
Once you're done testing the preview for syntax errors, click the 'Close Preview' button.



#### 4. Publish the Zendesk Help Center theme

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

Go to **Guide Admin** → **Customize (eye icon)** → **Preferred theme** → **Options (ellipsis icon)** → **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.