Video Transcript: Connect Zendesk to Data Cloud

[Link to video]

Hi, everyone. This is Vasanthi. I'm a Senior Product Manager on Data Cloud connectivity team. Today I'm going to demo Zendesk connector. I'll talk about how to set up the Zendesk connector and also what data you can bring in from the connector and how you can bring that connect data into Data Cloud.

To understand what data can be brought in from Zendesk, we already have our help page. So go to Zendesk Data Cloud help page, and then over here in Zendesk connector objects, you can see what objects are being brought in from this particular source. So these are all the objects we're bringing in, and if you click on any of the objects, you can see what fields are being brought in from that specific object.

Now, please note that this is only representative information and sometimes these connectors or APIs are dynamic and there could be slight variation in terms of what objects you see in in Data Cloud versus what we document because the APIs keep changing and that's what the Data Cloud brings in.

To begin with, log into your Data Cloud org and then go to Data Cloud Setup. So while you're in Data Cloud setup, the first thing you need to ensure is, because this is a beta connector, you need to go into feature manager and make sure this is enabled, connectors are enabled. This means you can access all the beta connectors. So for in my art, this is already enabled. So now I go into other connectors in Data Cloud Setup and then I need to click on new. And then look for Zendesk.

So let's say I give a name, connection name, and then API name. We have two authentication modes here, username password, and also API token. So I'll start with the username password, type in your username password, and URL is basically your Zendesk home URL. Then I can test connection to see if it's working. As you can see the connection is established and then I just click on save and then the connection will be established.

I'll also show how to do API authentication. So let's say I choose API token and then I give a different connection name. My username is still the same, to get your API token. So, how do you fetch your API token. So you're near Zendesk, URL. So click on settings. That takes you to the admin page. You should be able, you should log in to your Zendesk using your admin credentials, and then click on apps and integrations. And in Apps and integrations you can see API tokens. So you click on that, you need to add an API token, give it a description saying DC testing. So as it says, you can only save it once. So once the once the token is generated, you won't be able to copy it afterwards. So copy this token and make sure you save it somewhere, otherwise you'll, you won't be able to copy it later. So this is the one and then. And then the URL is the same. Yeah, I can save it unless you can see the connection is already getting established.

So if we go to these sources here, as you can see, the first one username password one is already active, and then the last one with the API token, it's getting processed. It should be connected in a while. Yeah, it's now active. So both the connections either using username, password, or the API token, both of them have been successfully established.

Once the connection is established, the next step is to go into Data Streams to fetch which objects are of interest to you and then start bringing that data into Data Cloud. So I click on the connection, I click on the connector of interest. In our case, it is Zendesk. So, and then you, you can click on the connection you're interested. We have Zendesk 2, Zendesk 3, respectively for username, password, and API token. I just choose one.

As you can see, there are a lot of objects that are being brought in from Zendesk connector, and then you can choose one that is of interest to you. Let's say I click on ticket metrics. And then you can choose the required fields you want to bring in and then choose the primary key. You can choose a record modified field. This is basically for incremental, when you, when you click on that. Choose your refreshed schedule, I'm saying daily at 6 UTC time.

It will take some time for the data stream status to get updated. It is, as you can see, it's currently in progress. You see here the last status has now been updated. It says a success and we've brought in 100 records. We can also check this data in Data Explorer to see what data we brought in. So you can see there are 32 columns and it brought in the required data. You can also edit columns to see which columns are of relevance to you and then. Yeah, get the required fields.

Thank you.

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