Zendesk-CRM Integration App FAQ

What are the changes to an existing Dynamics CRM system upon import of the Zendesk connector solution?

The Zendesk-CRM managed solution that is imported to Microsoft Dynamics CRM will add 4 new entities, which is used for setup to the end of the sitemap within CRM. It won't override any standard or custom entities or menu items. It also adds a web resource.   A user must manually add the web resource to the entities on which they would like to see Zendesk tickets.

Is the $50 price for the app per Zendesk user and/or per month?

The price is $50/month is required per Zendesk account. There is no per/user charge.

How is billing handled?

Billing is processed through a service called Stripe and is setup up as a recurring monthly payment. Billing can also be changed to an annual payment upon request.

Is there a trial available?

There is no free trial offered. However, the Zendesk-CRM Integration App can be purchased for only $50/month, and can be cancelled at the end of the first month if needed.

Which entities can be setup to display within Zendesk?

The account, contact and leads entities can all be configured to display data on a Zendesk ticket. You can pull data from all of those entities if needed, or just the relevant objects for your company.

Which fields are used to determine when to pull Dynamics CRM data out to Zendesk?

The connector is always matching on email addresses when determining what to display within Zendesk. It will compare the requester email (the individual who submitted the ticket) with the primary email off the contact, primary email off the lead, and for accounts it will match on the email of any contact associated to that account.

Which portion of setup controls what fields are displayed within Zendesk from Dynamics CRM?

The setup is handled within CRM on the main Zendesk Settings page under the Settings menu. The "Mapped Record Types" section allows you to specify any amount of standard and custom attributes to display from the account, contact, and lead entities.

Why are there multiple ZIP files included in the download for the Dynamics CRM solution package?

There is a file for both the 7.0 and 7.1 versions of CRM 2015. 7.0 corresponds to the original CRM 2015 release, and 7.1 is for the Update 1 release. There is another solution file for CRM 2016.

Why is the new offering a paid app compared to the earlier versions which were free to use?

There have been enhancements to the back-end of the solutions, including a re-write of the code that handles the communication between Zendesk and Dynamics CRM along with an update to the objects within the CRM solution. This, along with the fact that we will be periodically updating the solution with new features and enhancements has made it necessary that we charge a minimal subscription fee for our customers.

Can this connector be used with an on-premise deployment?

Yes, the connector will work with on-premise deployments as long as the port and firewall is opened up so that the CRM instance can be accessed outside of your network. Our web service needs to be able to interact directly with CRM in order to show the correct data in both Zendesk and CRM.

What happens with the app if we have a production and sandbox environment in Zendesk?

Currently, Zendesk does not recognize any apps purchased from the app store in more than one instance. If you have a sandbox instance and contact eOne Solutions we can provide you with a coupon code to get the app free of charge in the sandbox instance for as long as you have the app installed and paid for in the production instance.

Which entities can the ticket grid be displayed on within Dynamics CRM?

The ticket grid can be added to any entity by using the Add Web Resource option within the form editor in CRM. In order for it to display data though, an Entity Mapping needs to be setup to link an attribute from that entity the grid is placed on with a field from the Zendesk object. Common links are between the CRM Contact Email and the Zendesk User Email, or the CRM Account Name and the Zendesk Organization Name.