


Aug 08, 2020 02:59

Freshdesk Integration - User Guide - English

 This guide will lead you through the process of Freshdesk integration usage, starting from an installation, and ending with practical examples for call receiving.

Requirements:

- [WMS](#) version: 4.01 or higher
- Wildix [UC-Business](#) or [UC-Premium](#) license
- Freshdesk [Blossom plan](#) or higher
- Installed [Integration Service](#)

Created: July 2019

Updated: February 2020

Permalink: <https://confluence.wildix.com/x/MADmAg>

Features

- Click-to-call working on "Contacts" and "Tickets" pages
- Incoming and outgoing call popup
- Auto-detect existing contact and redirect to its page
- Creating a new contact via the sidebar
- Show Freshdesk About field in the pop-up

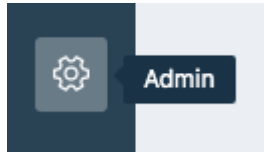
- [Link to the application](#)
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Link to the application

 The integration is now [available](#) for direct download from the Freshdesk marketplace!

Setup the Integration as Freshdesk App

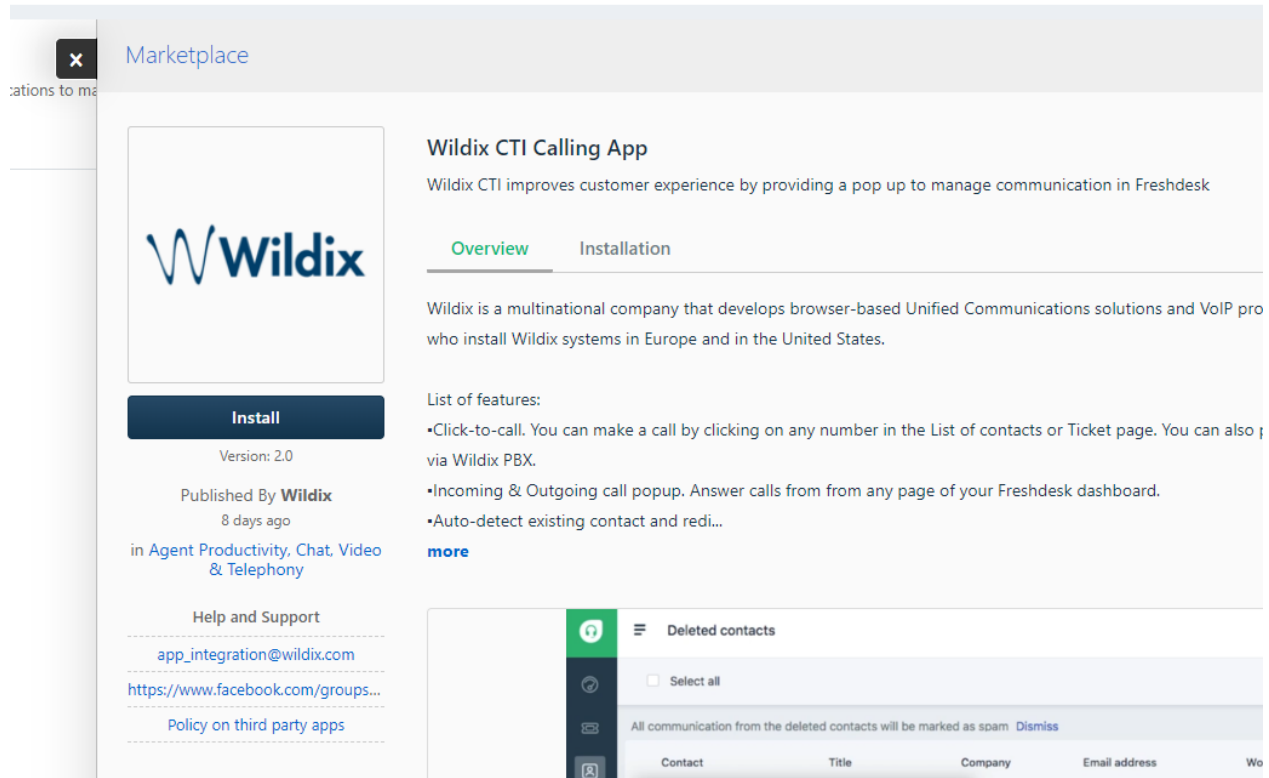
Setup the Freshdesk App



- Go to **Admin** tab in your Freshdesk dashboard



- Choose **Apps** from **Helpdesk Productivity** category
- Press the **Get More Apps** button
- In the sidebar search field, type: "Wildix CTI Calling App", and choose the integration
- Click on the **Install** button



The screenshot shows the 'Marketplace' interface in Freshdesk. On the left, there is a sidebar with a search bar and a list of categories. The main content area displays the 'Wildix CTI Calling App' page. The page includes the Wildix logo, an 'Install' button, and the following information:

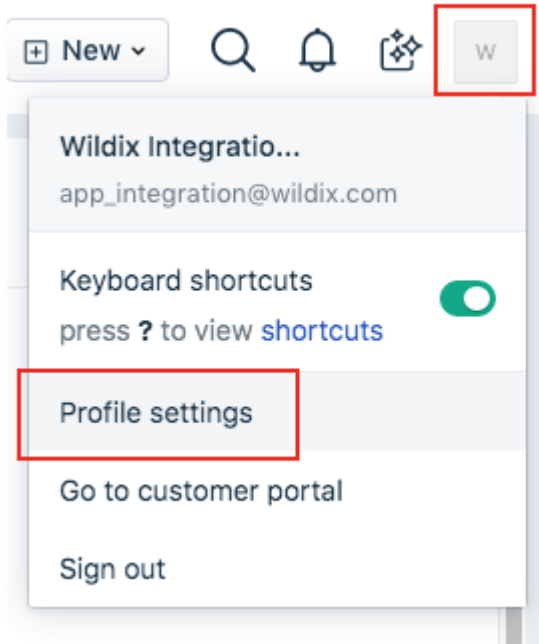
- Version: 2.0
- Published By **Wildix** 8 days ago
- in Agent Productivity, Chat, Video & Telephony
- Help and Support:
 - app_integration@wildix.com
 - <https://www.facebook.com/groups...>
 - [Policy on third party apps](#)

The app description states: "Wildix CTI improves customer experience by providing a pop up to manage communication in Freshdesk". It features an 'Overview' and 'Installation' tab. The 'Overview' section describes Wildix as a multinational company that develops browser-based Unified Communications solutions and VoIP products. A list of features includes:

- Click-to-call. You can make a call by clicking on any number in the List of contacts or Ticket page. You can also make calls via Wildix PBX.
- Incoming & Outgoing call popup. Answer calls from from any page of your Freshdesk dashboard.
- Auto-detect existing contact and redi...

Below the text, there is a preview of the 'Deleted contacts' interface, which shows a table with columns for Contact, Title, Company, Email address, and Wo. The table is currently empty, and there is a 'Select all' checkbox and a 'Dismiss' button for a notification that says "All communication from the deleted contacts will be marked as spam".

One last thing is to insert your API key. You can discover your key in your **Profile Settings**. Just press on your avatar in the top-right corner. In the sidebar on the right, you will find the API Key



[Add Photo](#)

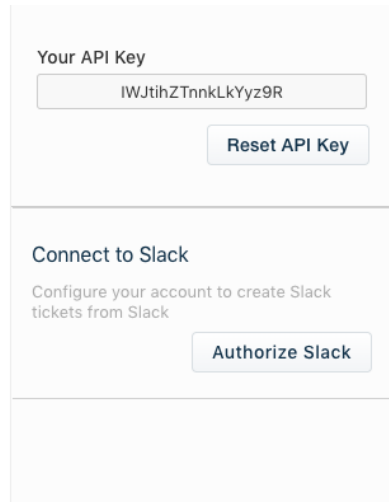
A Profile image of the person, it's best if the picture has the same length and height

Time zone

(GMT+05:30) Chennai

Language

English



Finish the installation process by copy your API key from the setting page and past it to the sidebar of the installer.

Application Usage

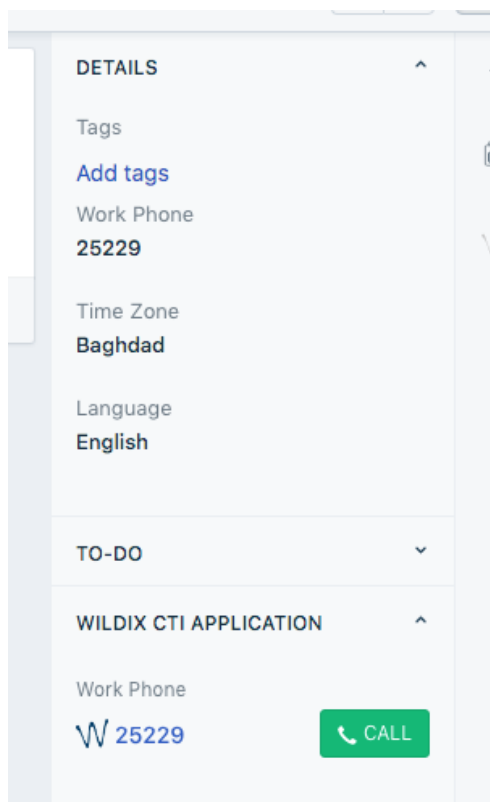
! Keep Collaboration open while working with Freshdesk

The Integration placed in two places:


- The icon in down - left corner. It shows and hides the pop-up



- Sidebar in the Tickets and Contacts pages. This is a place where Click-to-call button located





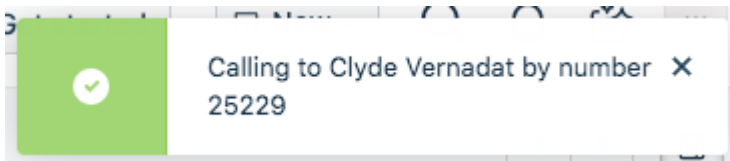
Make a Call

 Keep Collaboration open while working with the application


Making a Call Using Click-to-Dial

You can not call contacts without a phone number. The application recognizes both **Work phone** and **Mobile phone** fields from the Freshdesk.

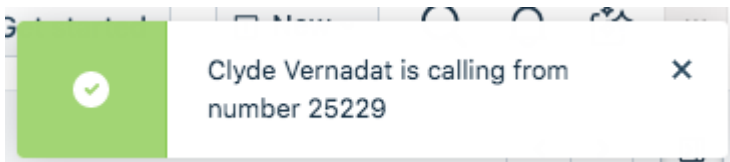
1. Locate the number that you want to dial in a contact or Ticket pages.
2. Click the  call button or the number. The number is automatically dialed in the softphone (Collaboration application).
 - A number that has already been clicked cannot be clicked again for five seconds.
 - The  button does not appear next to fax numbers.
3. Pop-up now shows contact info: name and phone number. And you'll receive a notification about an outgoing call in the top-right corner.



Answer a Call

 Keep Collaboration open while working with the application

You can tell that you have an incoming call if you see a flashing red button near your tab name on the browser. It also plays the ringtone. You should also receive a notification in the top-right corner



Details about the call, if any, are displayed just above the **Answer** button, and typically include:

- Caller Avatar placeholder
- Caller name
- Caller's phone number.
- **About** field from the CRM

To answer an incoming call, press the green button in the pop-up.

