

Setup Guide:

Zendesk for NetSuite

Select your SyncApps

Integrating your Cloud, On-Premise or Plug-in application with your Financials, Marketing, eCommerce, Support, and other mission-critical applications is now a reality.

CAZOOMI™

Login More About Cazoomi

FIND INTEGRATION PRICING TEARDOWN BLOG GET STARTED

Sync Zendesk to NetSuite

Get Started
2 Weeks Free

Plans Starting at
\$49.99/month/company

zendesk + NETSUITE

Major Features Pricing Product Support How it Works About Videos

Major Features

- ✓ Select the Sync Mode right for your NetSuite.
- ✓ 4 Supported integration modes: Zendesk Ticket to NetSuite Case (One-way ticket sync) | NetSuite Case to Zendesk Ticket (One-way ticket sync) | Sync Zendesk Ticket to NetSuite Case only if NetSuite Case does not exist. Sync NetSuite Case update to Zendesk Ticket | Do not sync Zendesk Ticket to NetSuite



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

Register your Credentials

Signing up for an account is as easy as putting in your Email, Name, Company Name and choosing your password. After you create an account, you and your company will get instant access to all Sync Profiles for 2 weeks, and we don't require a credit card during the trial, so you get to try Cazoomi risk-free.

START YOUR SYNCAPPS FREE TRIAL TODAY

Experience 2 weeks trial with access to all SyncApps, on-demand sync ability and more!

EMAIL ADDRESS

Email address will be used for login.

FIRST NAME

LAST NAME

COMPANY NAME

PASSWORD

6-character minimum; case sensitive

RE-TYPE PASSWORD

By pressing "Start Free Trial", you agree to Cazoomi's [Terms of Service and Privacy Policy](#).

[START FREE TRIAL](#)

How Your Trial Works

After you create your account, you get instant access to all Sync Profiles for 2 weeks & we don't require a credit card during the trial, so you get to try Cazoomi risk-free.

If you haven't upgraded yet within the 2 weeks trial, our Cazoomi team will send you an email reminder before your trial ends so you will still have some time to choose one of our three subscription plans.

When you choose the subscription plan that is right for you, your account will be instantly upgraded.

Join These Happy SyncApps Customers

Jcurve **UB** **LYTRO**



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

[Contact Us!](#)

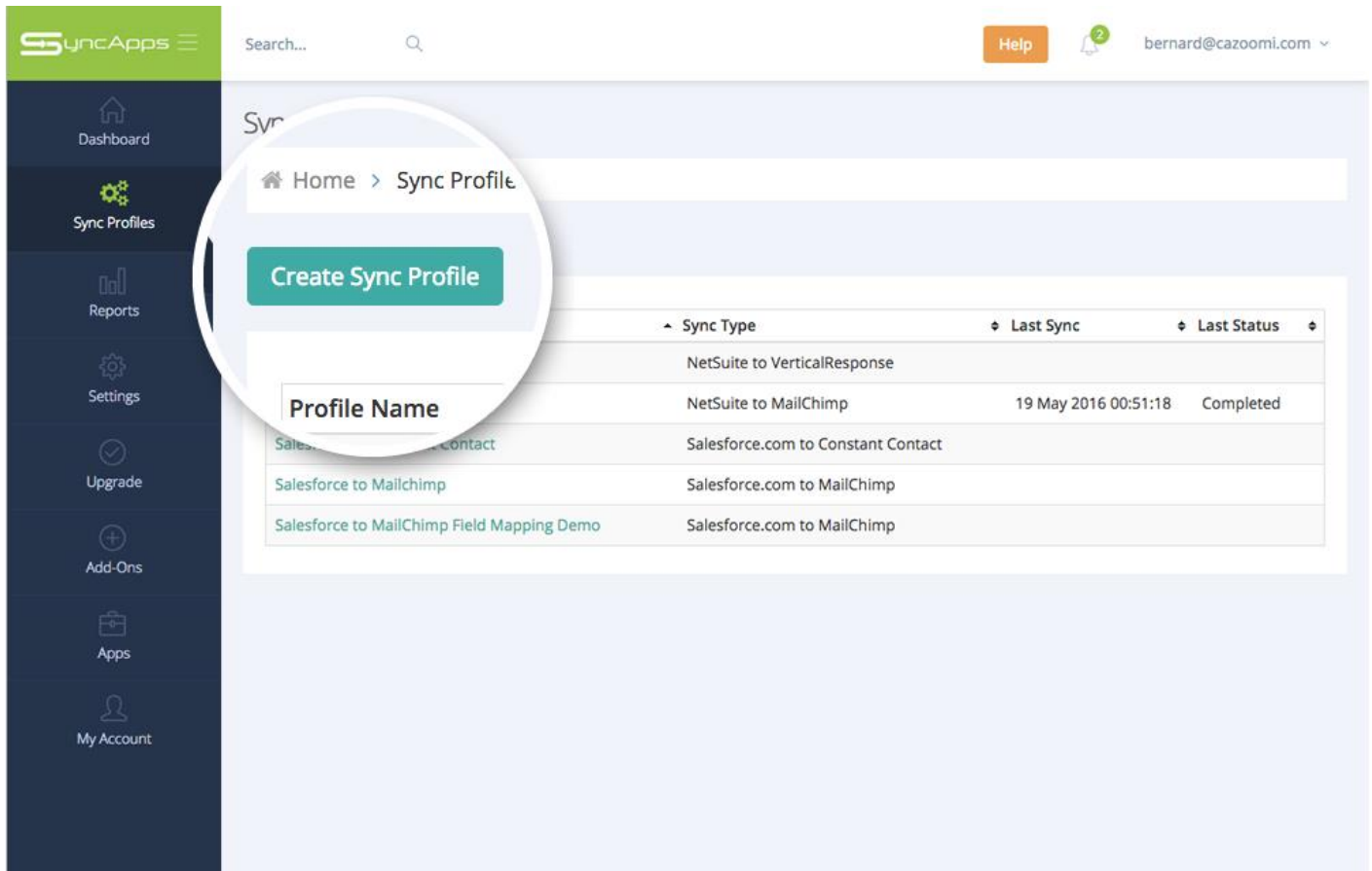
MAJOR FEATURES

- Select the Sync Mode right for your NetSuite.
- Zendesk Ticket to NetSuite Case (One-way ticket sync) | NetSuite Case to Zendesk Ticket (One-way ticket sync)
- Sync Zendesk Ticket to NetSuite Case only if NetSuite Case does not exist.
- Sync NetSuite Case update to Zendesk Ticket
- Do not sync Zendesk Ticket to NetSuite.
- Sync Zendesk tickets to NetSuite Cases.
- Option to sync only Zendesk Tickets to NetSuite with a specified tag.
- Migrate NetSuite Cases to Zendesk Tickets.
- Migrate Historical Zendesk Tickets to NetSuite Cases.
- Sync Zendesk Users to NetSuite Contacts.
- Sync NetSuite Customers to Zendesk users. (Feature available upon request)
- Add or Update Contact details in Zendesk with NetSuite Contact data.
- Zendesk Apps for NetSuite available for Enterprise subscribers. (*All Sales orders, Balances + Customer Search feature & more*)
- Search NetSuite Customer from Zendesk Ticket | View NetSuite Sales Orders in Zendesk .
- Custom Records Tab (Warranty, RMA) build to your NetSuite specifications.
- Sync all Zendesk Ticket comments to NetSuite Support Case messages.
- Sync all NetSuite Support Case messages to Zendesk Ticket comments.
- Zendesk to NetSuite Time Tracking. Zendesk Time Tracking app (<https://www.zendesk.com/apps/time-tracking/>) must be installed in Zendesk.
- Custom Field Mapping between NetSuite Case, Customer and Zendesk Ticket, User, Organization. (Customization available upon request for NetSuite SFA objects like Sales Orders, Invoices, Products, etc.)
- Free access to our first Enterprise Import App, "Bulk Zendesk Organization Update", to Update Zendesk Orgs name, Import unlimited records to Zendesk, Quickly import user's time zone, or photo, or language preference, etc. (Enterprise Plans only)

1

Create Sync Profile

Select the Apps you use to get started as this will also include any Sync Add-Ons, field mapping or filters.



The screenshot shows the SyncApps dashboard interface. On the left is a dark blue sidebar with navigation icons for Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The main content area has a light blue header with a search bar, a Help button, and a user profile for 'bernard@cazoomi.com'. Below the header is a breadcrumb trail: 'Home > Sync Profile'. A prominent green button labeled 'Create Sync Profile' is highlighted with a white circular callout. Below this is a table listing existing sync profiles.

Profile Name	Sync Type	Last Sync	Last Status
NetSuite to VerticalResponse	NetSuite to VerticalResponse		
NetSuite to MailChimp	NetSuite to MailChimp	19 May 2016 00:51:18	Completed
Salesforce.com to Constant Contact	Salesforce.com to Constant Contact		
Salesforce to MailChimp	Salesforce.com to MailChimp		
Salesforce to MailChimp Field Mapping Demo	Salesforce.com to MailChimp		

i A Sync Profile refers to the setup of 2 available software applications where one application is synced to another application. This includes all the settings for both applications including connection configuration, field mapping, and Sync scheduling.



Questions? Contact our 24/7 support team.

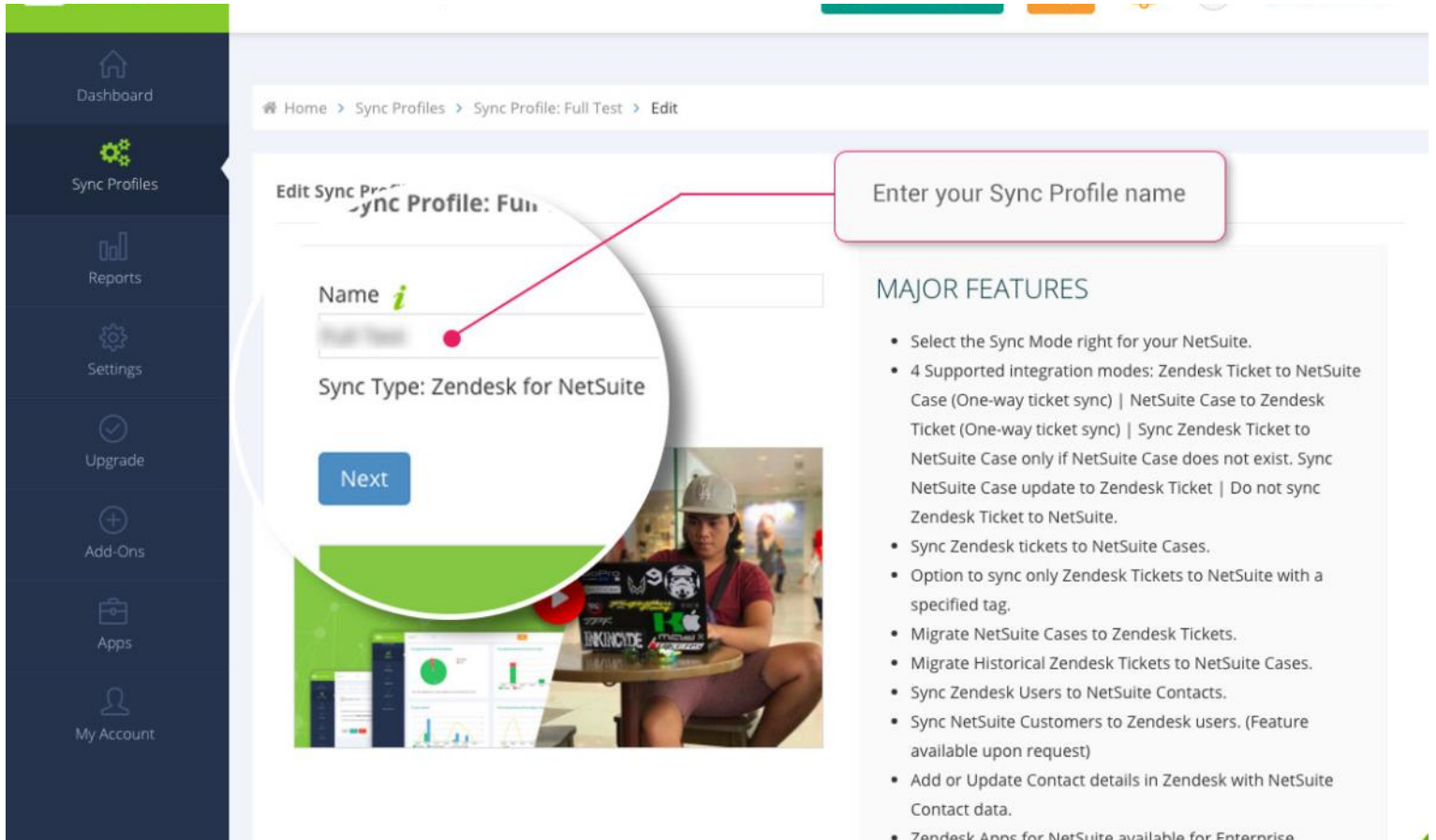
Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

2

Enter Profile Name

Enter your Sync Profile name. The Sync Profile, or in plain English, the integration name, is just a description for you to remember the Sync Profile that you will create so it is easy to get to the one you need to if you need to edit it later.



The screenshot shows the 'Edit Sync Profile' page for 'Full Test'. The breadcrumb trail is 'Home > Sync Profiles > Sync Profile: Full Test > Edit'. The page title is 'Edit Sync Profile: Full Test'. The 'Name' field is highlighted with a red callout box containing the text 'Enter your Sync Profile name'. Below the name field, the 'Sync Type' is set to 'Zendesk for NetSuite'. A blue 'Next' button is visible. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The right sidebar lists 'MAJOR FEATURES' with a bulleted list of integration capabilities.

MAJOR FEATURES

- Select the Sync Mode right for your NetSuite.
- 4 Supported integration modes: Zendesk Ticket to NetSuite Case (One-way ticket sync) | NetSuite Case to Zendesk Ticket (One-way ticket sync) | Sync Zendesk Ticket to NetSuite Case only if NetSuite Case does not exist, Sync NetSuite Case update to Zendesk Ticket | Do not sync Zendesk Ticket to NetSuite.
- Sync Zendesk tickets to NetSuite Cases.
- Option to sync only Zendesk Tickets to NetSuite with a specified tag.
- Migrate NetSuite Cases to Zendesk Tickets.
- Migrate Historical Zendesk Tickets to NetSuite Cases.
- Sync Zendesk Users to NetSuite Contacts.
- Sync NetSuite Customers to Zendesk users. (Feature available upon request)
- Add or Update Contact details in Zendesk with NetSuite Contact data.
- Zendesk Anns for NetSuite available for Enterprise



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

3

Enter Zendesk credentials

Next, enter your Zendesk Credentials and if you have any questions, hover over your SyncNotes tooltip to get more information. ps..., those are the little green *i* in the setup steps throughout SyncApps.

Dashboard

Sync Profiles

Reports

Settings

Upgrade

Add-Ons

Apps

My Account

Home > Sync Profiles > Sync Profile: Full Test > Edit

1 Zendesk 2 Additional Configuration 3 Field Mapping 4 Sync Scheduling

Zendesk URL *i*

Username *i*

Password

Ticket Tag to Sync (Optional) *i*

Do not send welcome email to Zendesk user created by the SyncApps. *i*

Sync Mode *i*

- Zendesk Ticket to NetSuite Case (One way ticket sync).
- NetSuite Case to Zendesk Ticket (One way ticket sync).
- Sync Zendesk Ticket to NetSuite Case only if NetSuite Case does not exist at time of sync. Sync NetSuite Case updates to Zendesk Ticket.
- Do not sync Zendesk tickets.

Need Help?

Search here 🔍

Enter Zendesk credentials



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

4 Insert your NetSuite Credentials

Enter NetSuite Credentials. Connecting to NetSuite is super simple. Just enter your credentials and Account ID to get started. To review NetSuite role permissions prior to integration setup for Step 1 in your Sync Profile please see our [article](#).

Dashboard

Sync Profiles

Reports

Settings

Upgrade

Add-Ons

Apps

My Account

Home > Sync Profiles > Sync Profile: [Name] > Edit

1 NetSuite 2 Additional Configuration 3 Field Mapping 4 Sync Scheduling

Username

Password

Account ID

Enter NetSuite credentials

Search here

Use NetSuite sandbox account (for v2.0 sandbox please uncheck this option)

Sync NetSuite Customers * Zendesk

ID	Name	Type

Create Zendesk organization for each synced Contact's company.

Create new NetSuite Contact if Zendesk user email address cannot be found but its organization was synced previously from NetSuite.



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

5

Additional Configuration

Additional Configuration. The Additional Configuration screen allows you to select additional options to suit your integration requirements like Zendesk ticket value mapping, ticket statuses and more.

Customer Sync
Sync Customer or Contact Details
Ticket Sync
 Sync Zendesk ticket comment using HTML format instead of plain text.
Ticket Field Value Mapping

Zendesk Priority	NetSuite Priority
Low	Low
Normal	Medium
High	High
Urgent	High

Zendesk Type	NetSuite Type
Blank/Not Set	
Question	Question
Incident	Incident
Task	Task



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

6

Field Mapping

Next is Field Mapping. Field Mapping from NetSuite and Zendesk allows you to update existing records or new records with ease.

Need to map NetSuite Customer record fields to Zendesk Organization fields? See our [article](#) and get in touch.

Home > Sync Profiles > Sync Profile: [Name] > Edit

1 Zendesk 2 NetSuite 3 Additional Configuration 4 Field Mapping 5 Sync Scheduling

Enable Additional Field Mappings ⓘ

Zendesk Field

NetSuite Field

Mapping Direction

Zendesk to NetSuite

Fields with (*) are read only fields, cannot be used as mapping target.

Add Mapping Refresh Fields

If your new created fields are not available in the field selection list please press the above "Refresh Fields" button to retrieve latest fields data from Zendesk and NetSuite.

After adding new mapping please reset your SyncApps so all your data will be re-synced with the new mapping. ⓘ

Current Mapping

Zendesk	NetSuite



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

[Contact Us!](#)

7

Sync Scheduling

And the last step is Sync Scheduling. Sync Scheduling can be set up on paid plans. Sync on Demand is available for all trials to allow quick testing of your Zendesk for NetSuite integration.

The screenshot shows the 'Sync Scheduling' step in a five-step configuration process. The steps are: 1. Zendesk, 2. NetSuite, 3. Additional Configuration, 4. Field Mapping, and 5. Sync Scheduling. The 'Sync Scheduling' step is highlighted with a red circle. A callout box points to the 'Sync Scheduling' step, containing the following configuration options:

- Fixed Interval
- Every Hours
- Sync on specific days (Once a da...)
- S M T W T F S
- Sync Time ⓘ
- Between 12 AM to 03 AM GMT
- Buttons: Back, Finish

A red line connects the 'Finish' button to a callout box labeled 'Sync Scheduling'.



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

Press the "Sync Now" button from your Sync Profile screen to sync your data immediately.

The screenshot shows the 'Sync Profile: zd to ns' page. The left sidebar contains navigation options: Dashboard, Sync Profiles, Reports, Settings, Upgrade, Add-Ons, Apps, and My Account. The main content area displays the following details:

- Summary**
- Plan Type:** Enterprise (Tier-4)
- Add-on Subscription**
 - Get Satisfaction Add-On (Free)
 - Twilio Call Tracking Add-On (Free)
- Profile ID:** 941489846
- Status:** Enabled
- Created:** 19 Oct 2017 12:13:55 CST
- Sync Type:** Zendesk for NetSuite
- Scheduling:** Disabled

At the bottom of the profile details are buttons for Edit, Disable, Delete, and Sync. A callout box on the right side of the interface highlights two buttons:

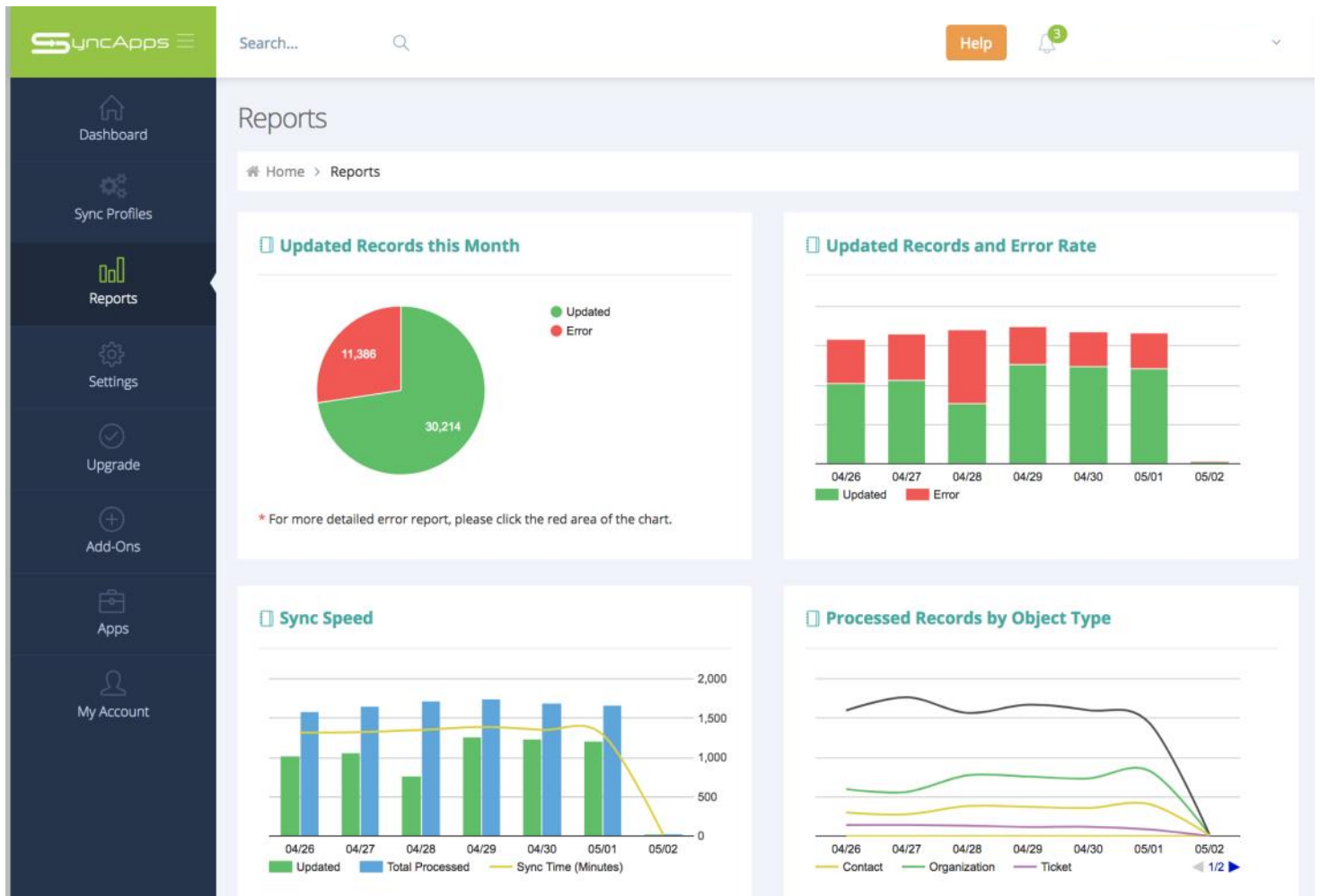
- Sync Now:** A blue button with a circular refresh icon. Text above it says: "Press the Sync Now button to sync your Sync Profile immediately."
- Reset Sync Process:** A teal button with a circular refresh icon and a close symbol. Text above it says: "Press the Reset Sync Process button to Reset your Sync Profile. Please note - you will lose your previous settings in your Sync Profile."



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!

Cazoomi Story

SyncApps® by Cazoomi offers an integration framework available to unite your company's data.

Deploying Software-as-a-Service for Financials, CRM & Marketing, eCommerce or Support?

SyncApps® by Cazoomi is the easiest way to synchronize your applications without breaking the bank. Once available to only Fortune 1000 companies, Cazoomi introduces a way for your business applications to talk to each other for less than the price of a Netflix subscription.

See other small businesses, education and nonprofits to even large enterprises who started on a Free Trial.



Questions? Contact our 24/7 support team.

Touch base with the Cazoomi product team leads, share ideas, and get answers to your SyncApps questions.

Contact Us!