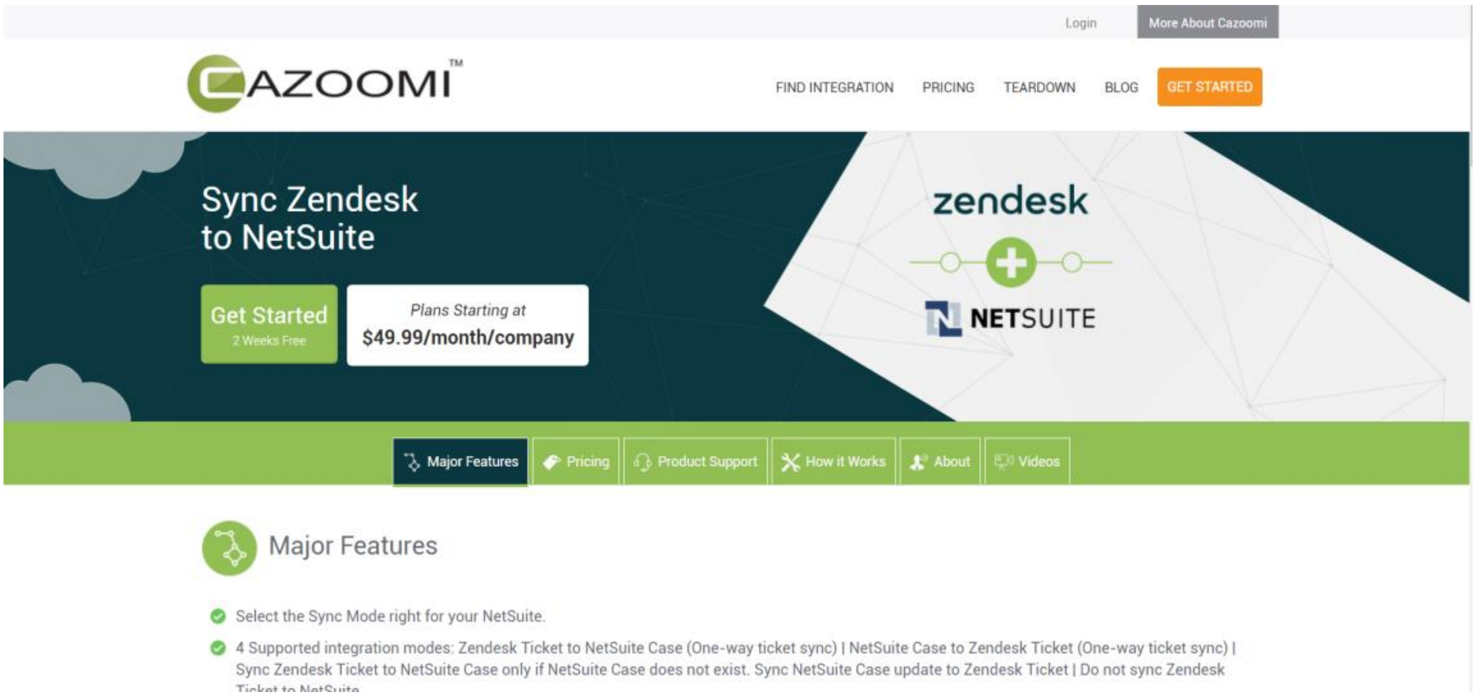
Setup Guide:

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.



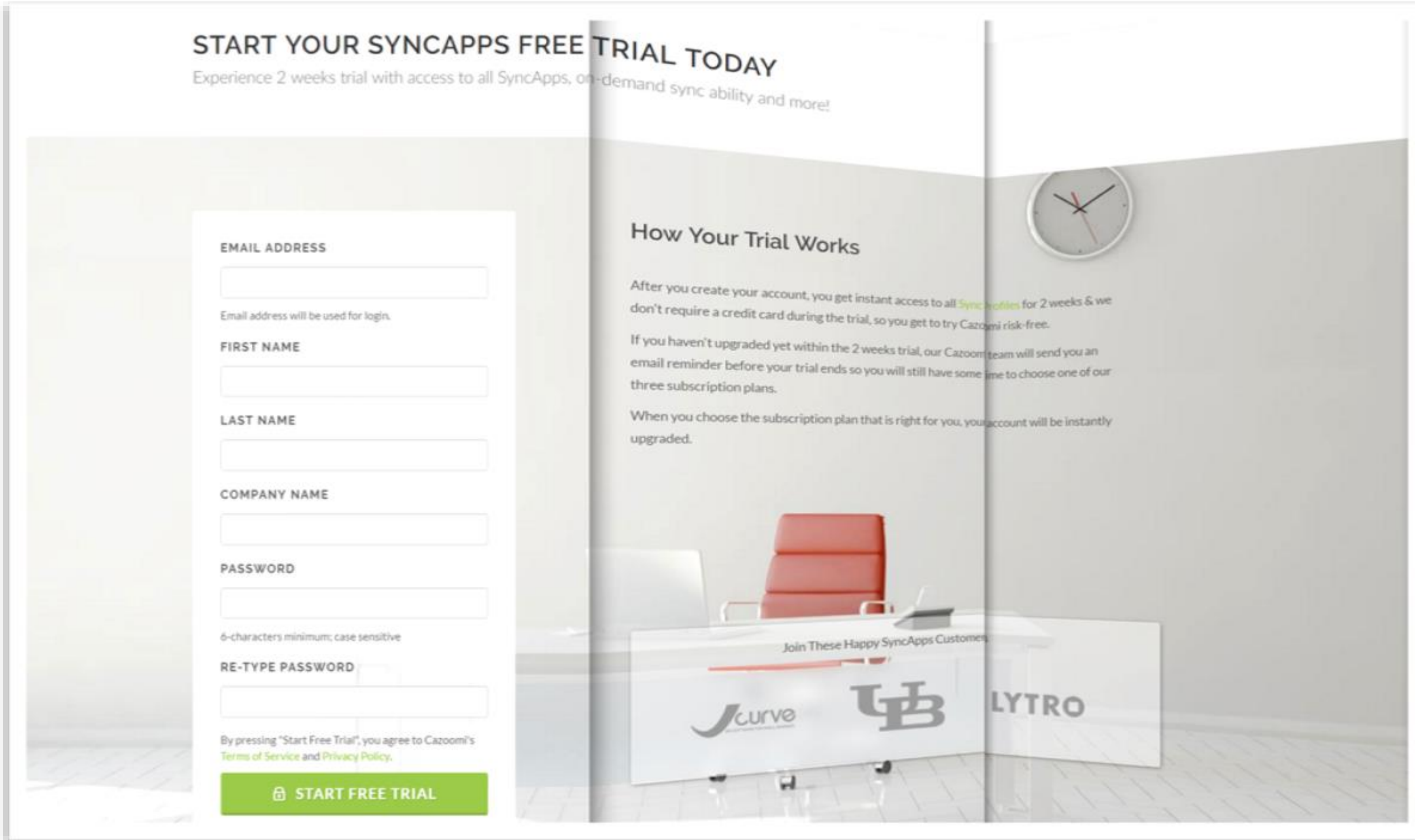
Questions? Contact our 24/7 support team.

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.



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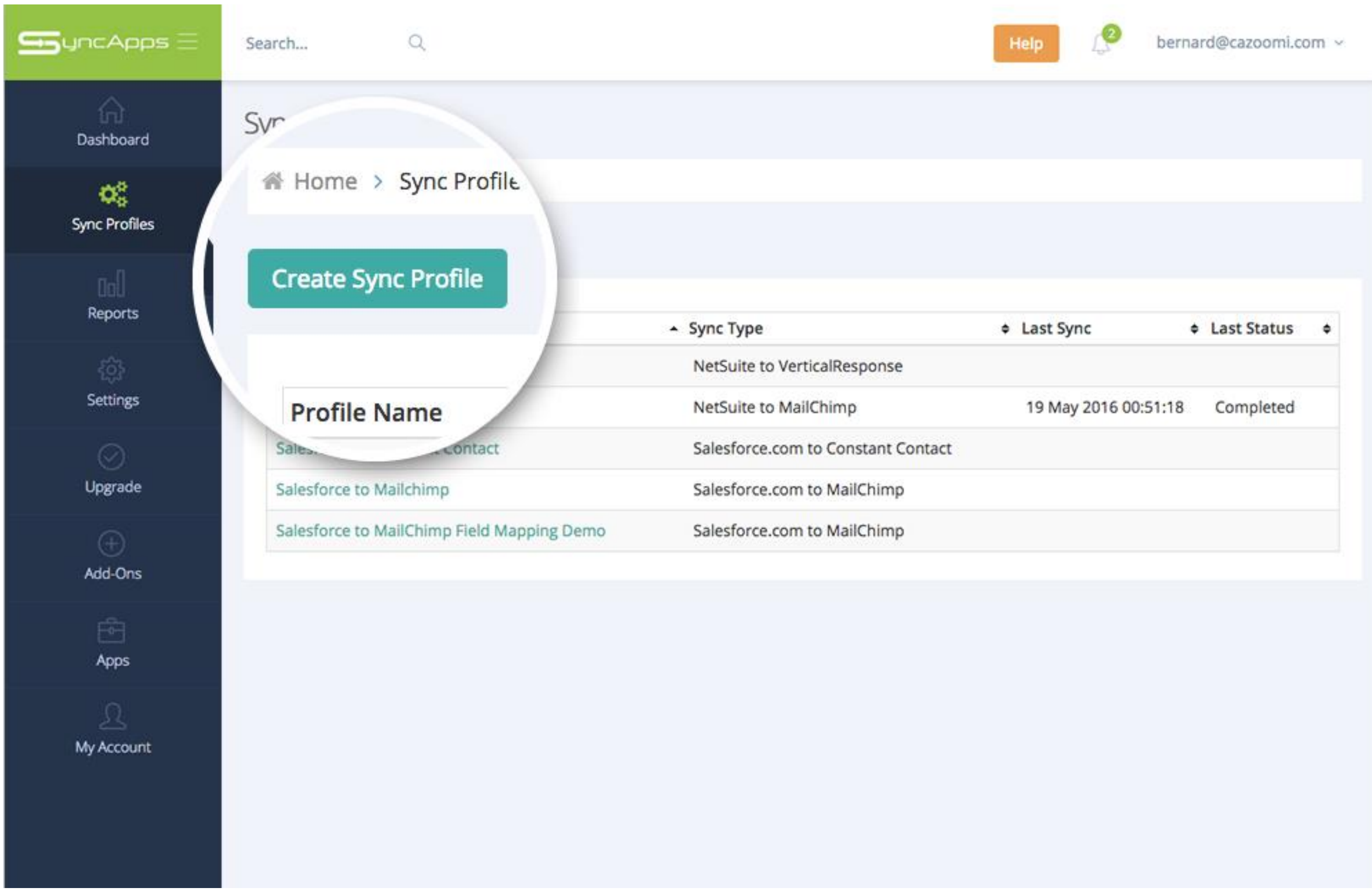
MAJOR FEATURES

- 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.



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.

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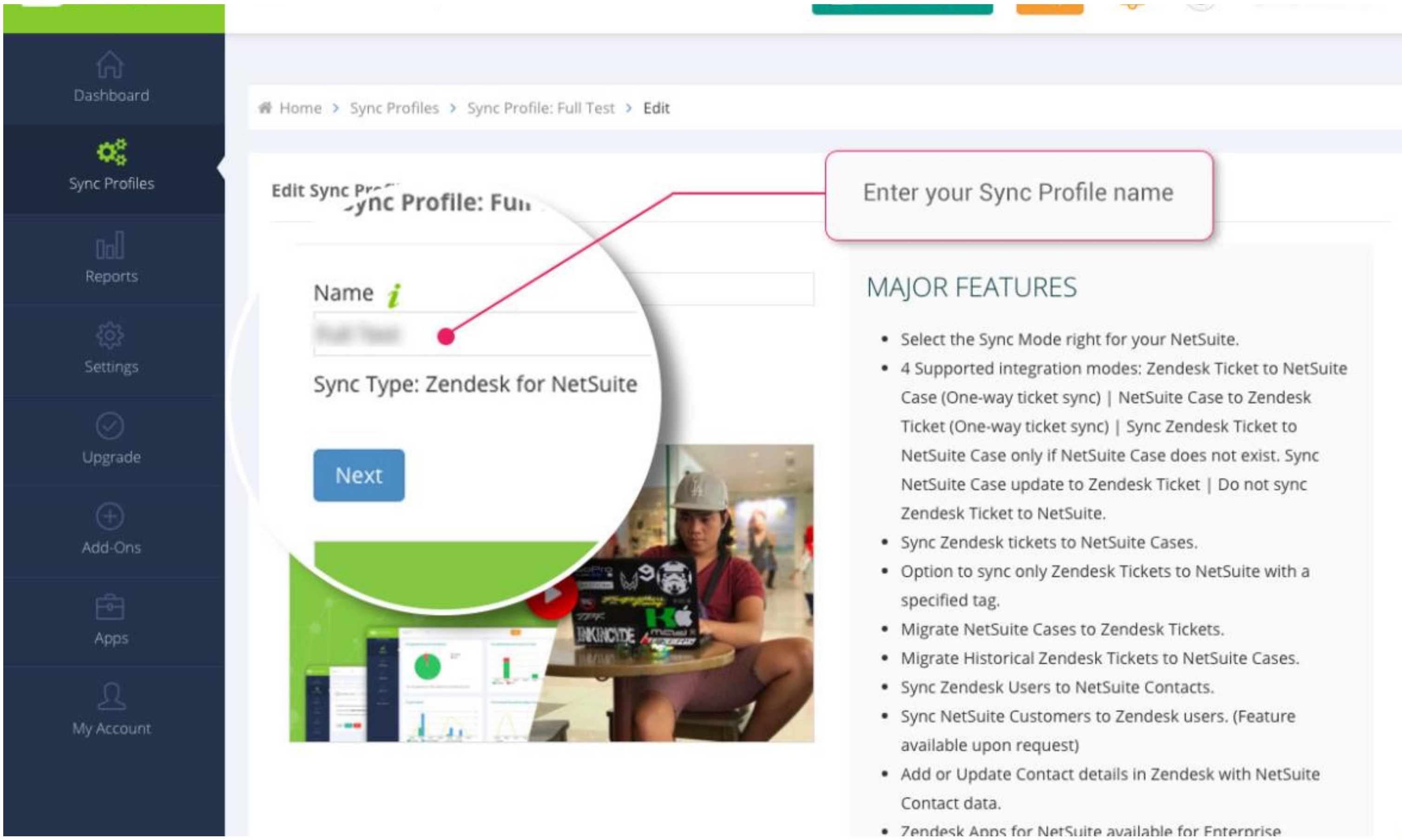
2 Enter Profile Name

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.



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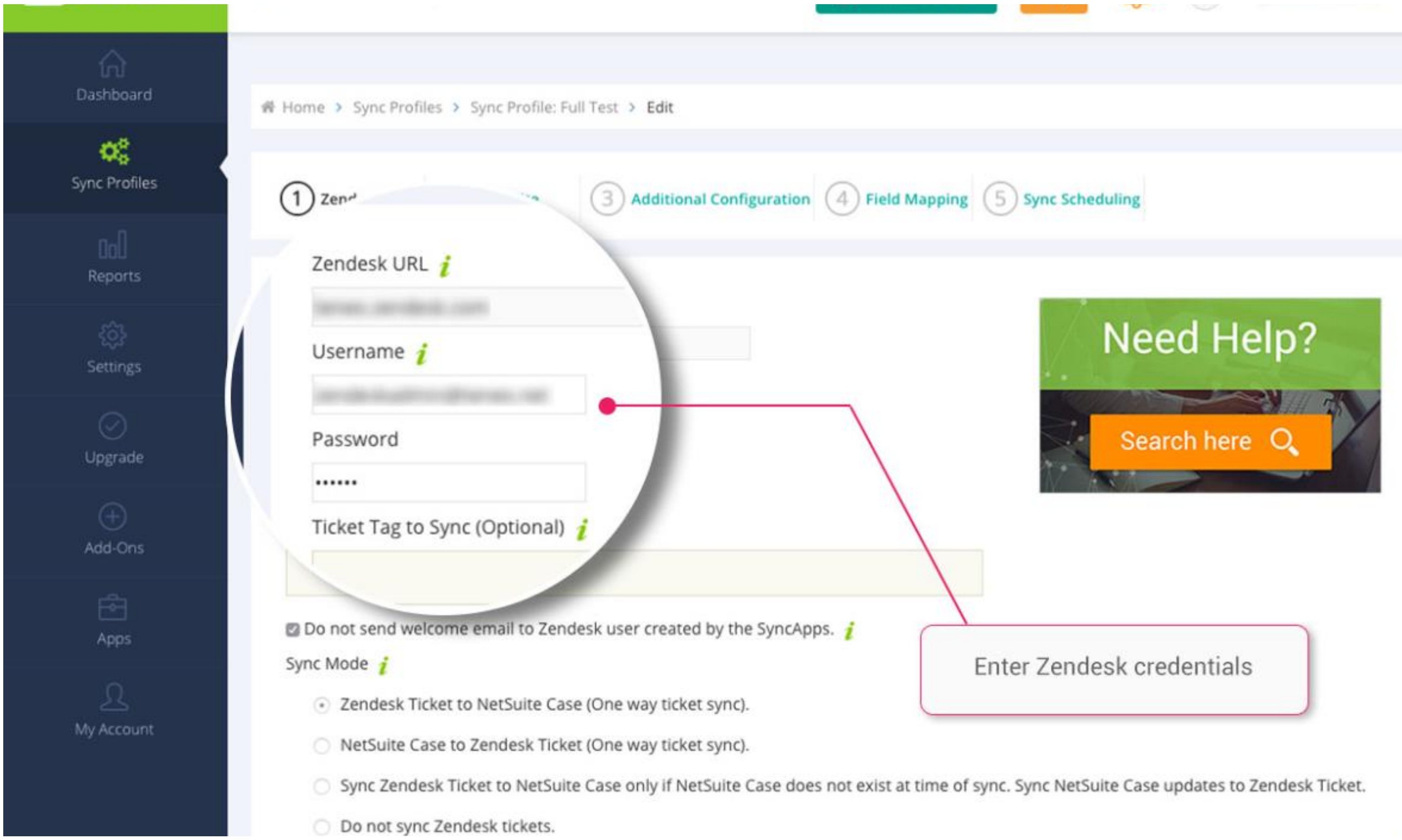
3 Enter Zendesk credentials

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.



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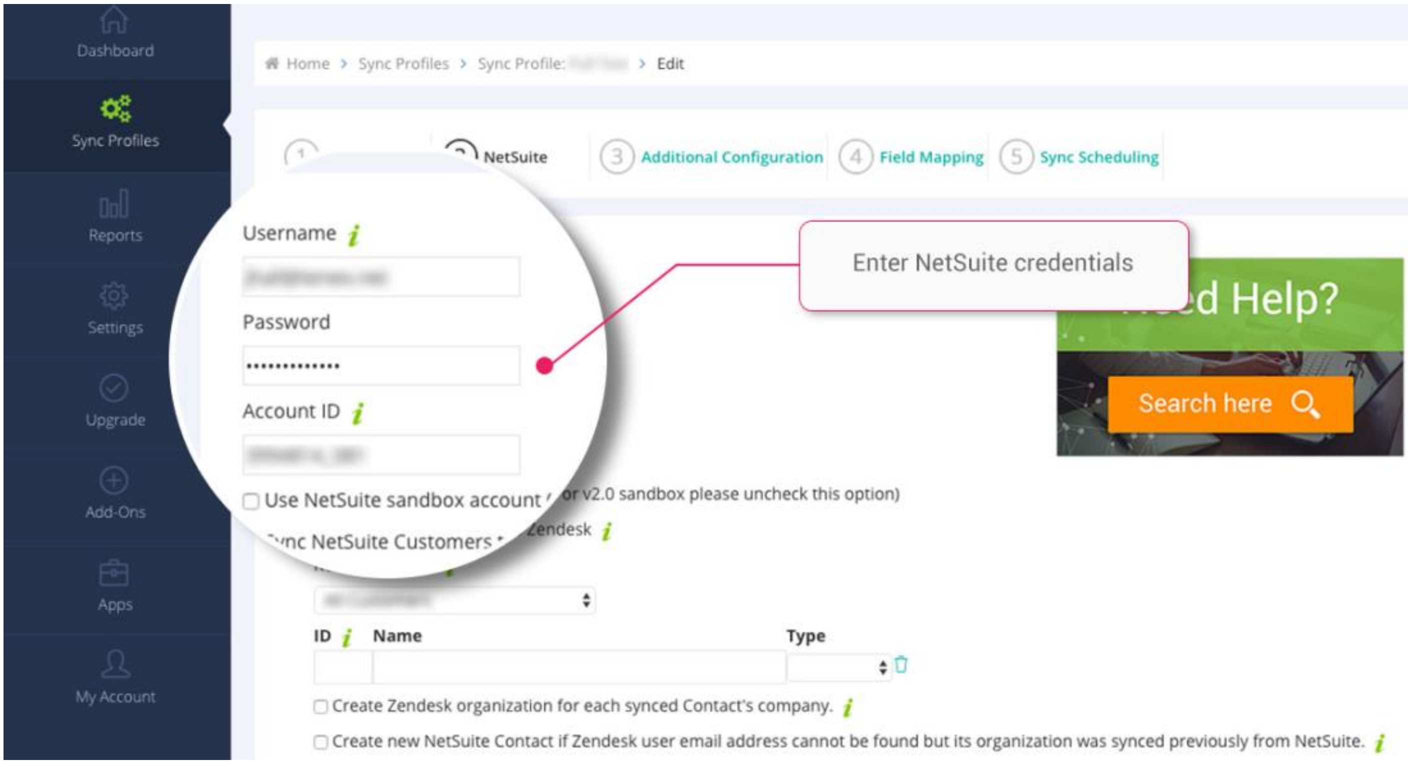
4 Insert your NetSuite Credentials

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.



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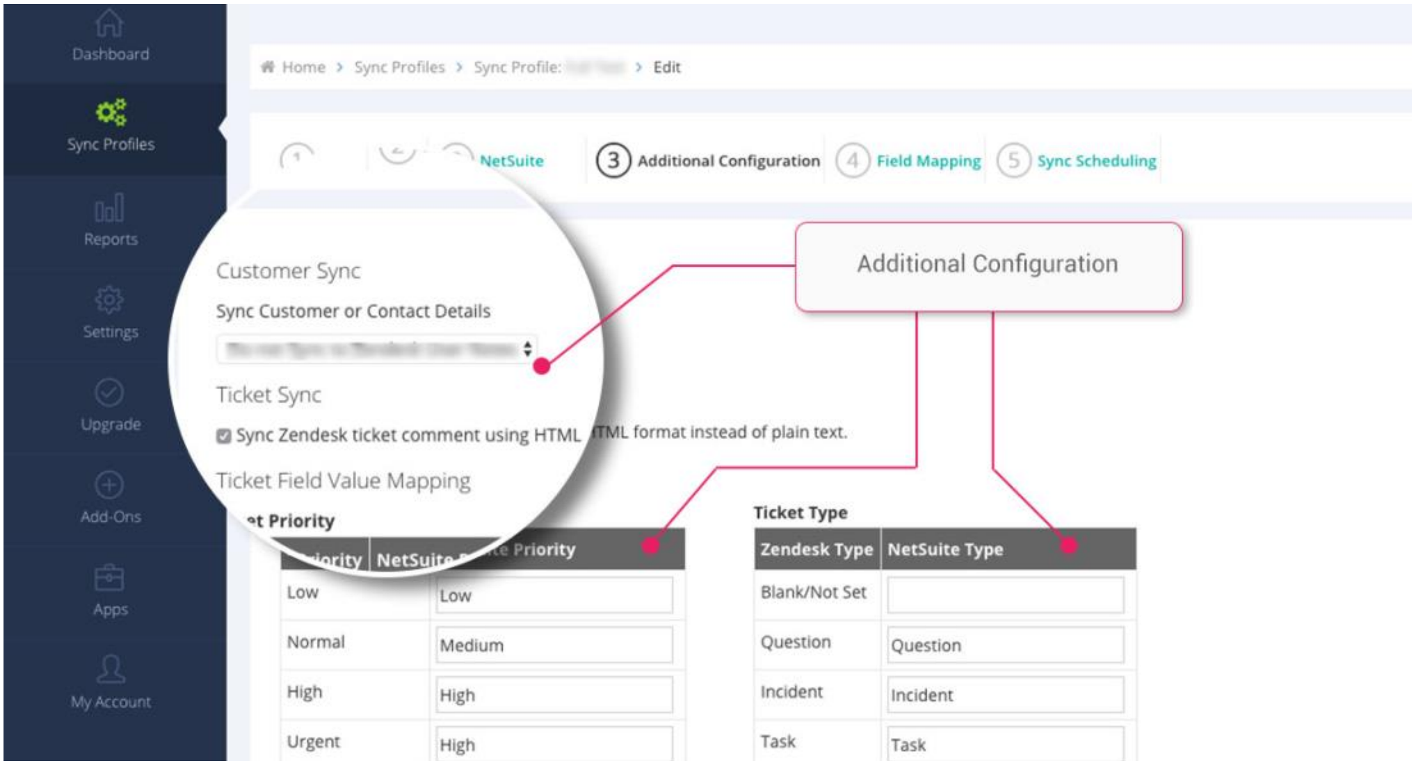
5 Additional Configuration

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.



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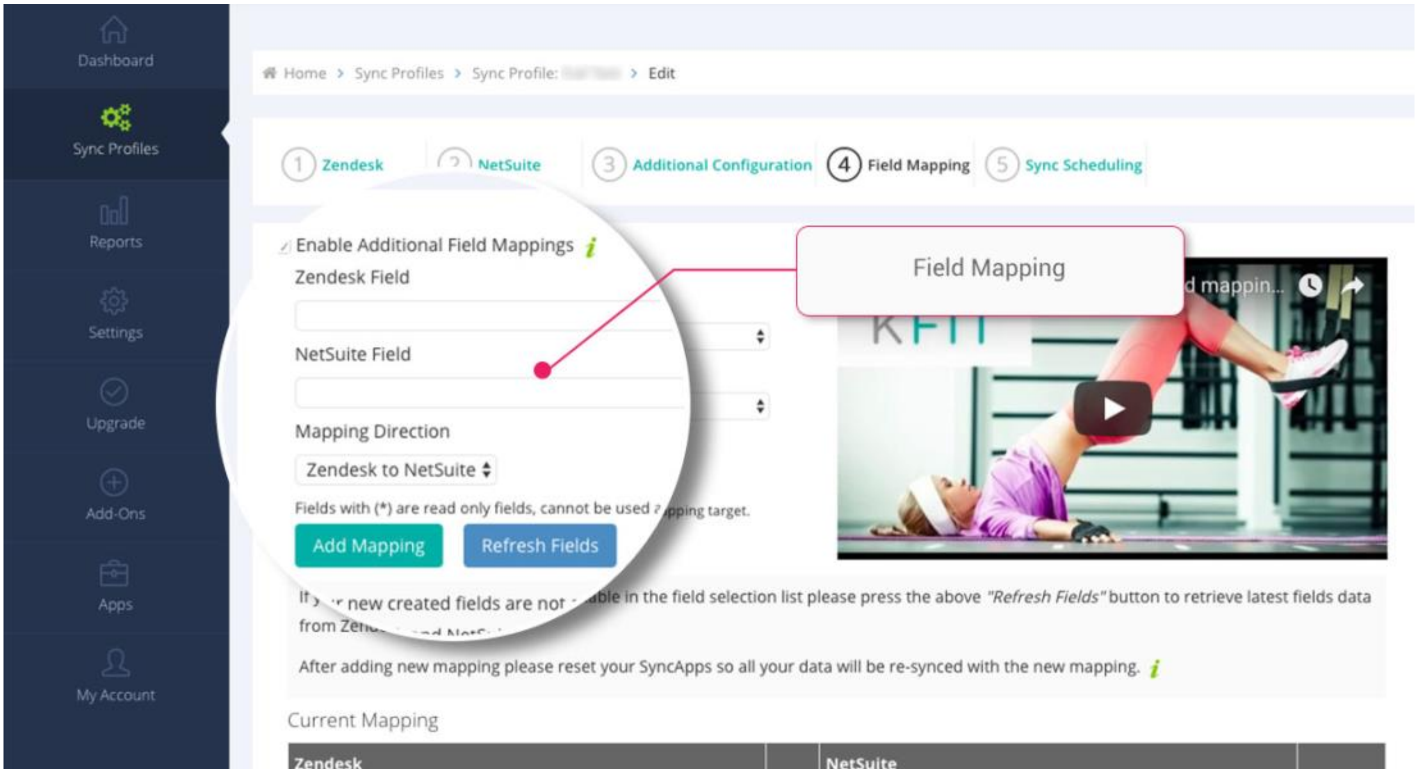
6 Field Mapping

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.



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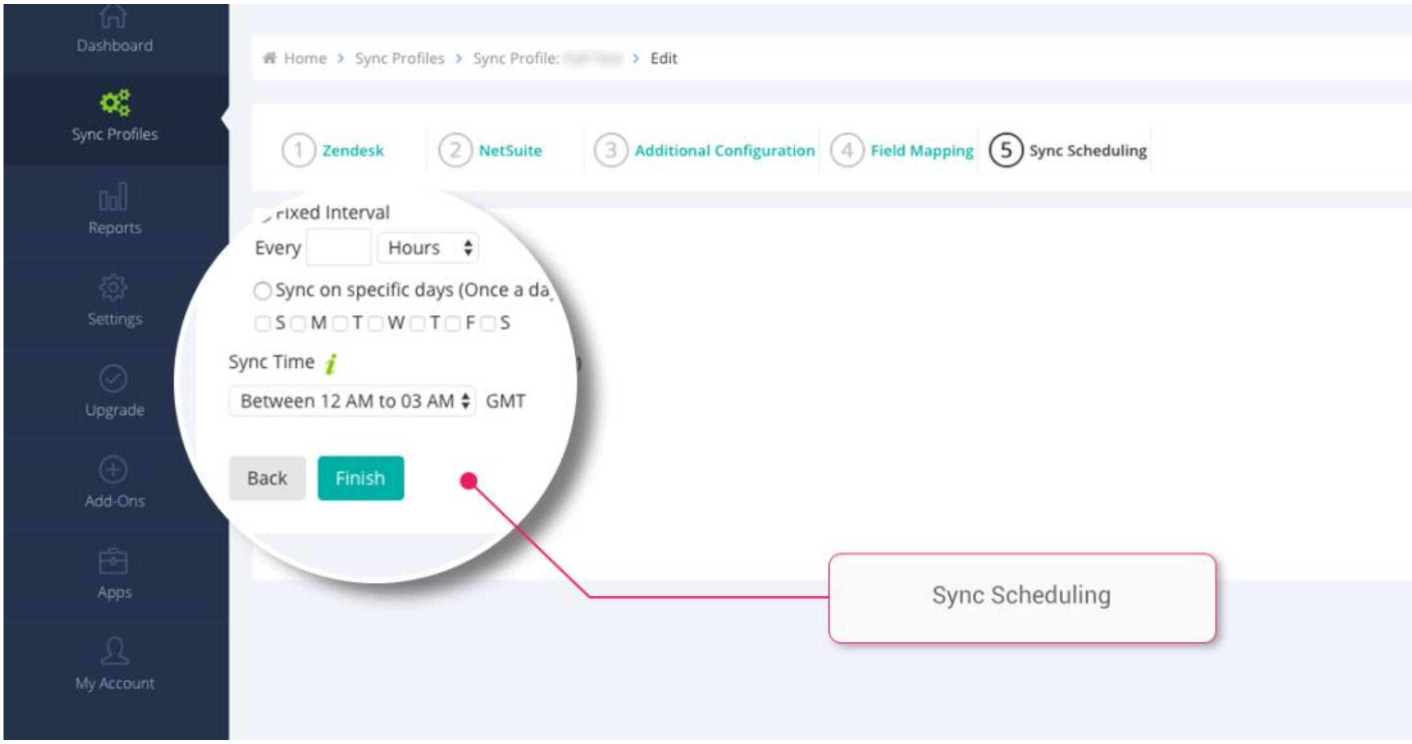
7 Sync Scheduling

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.



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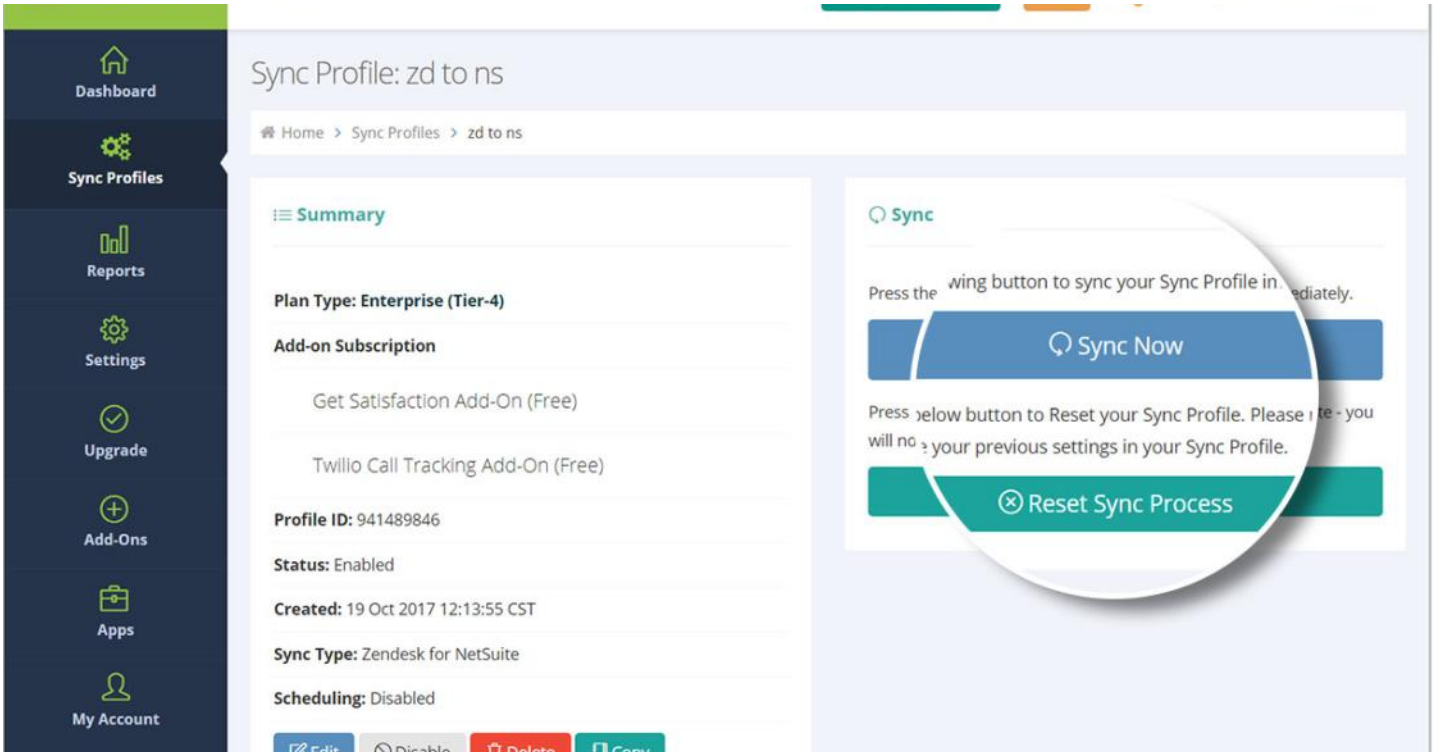
8 Sync Now

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



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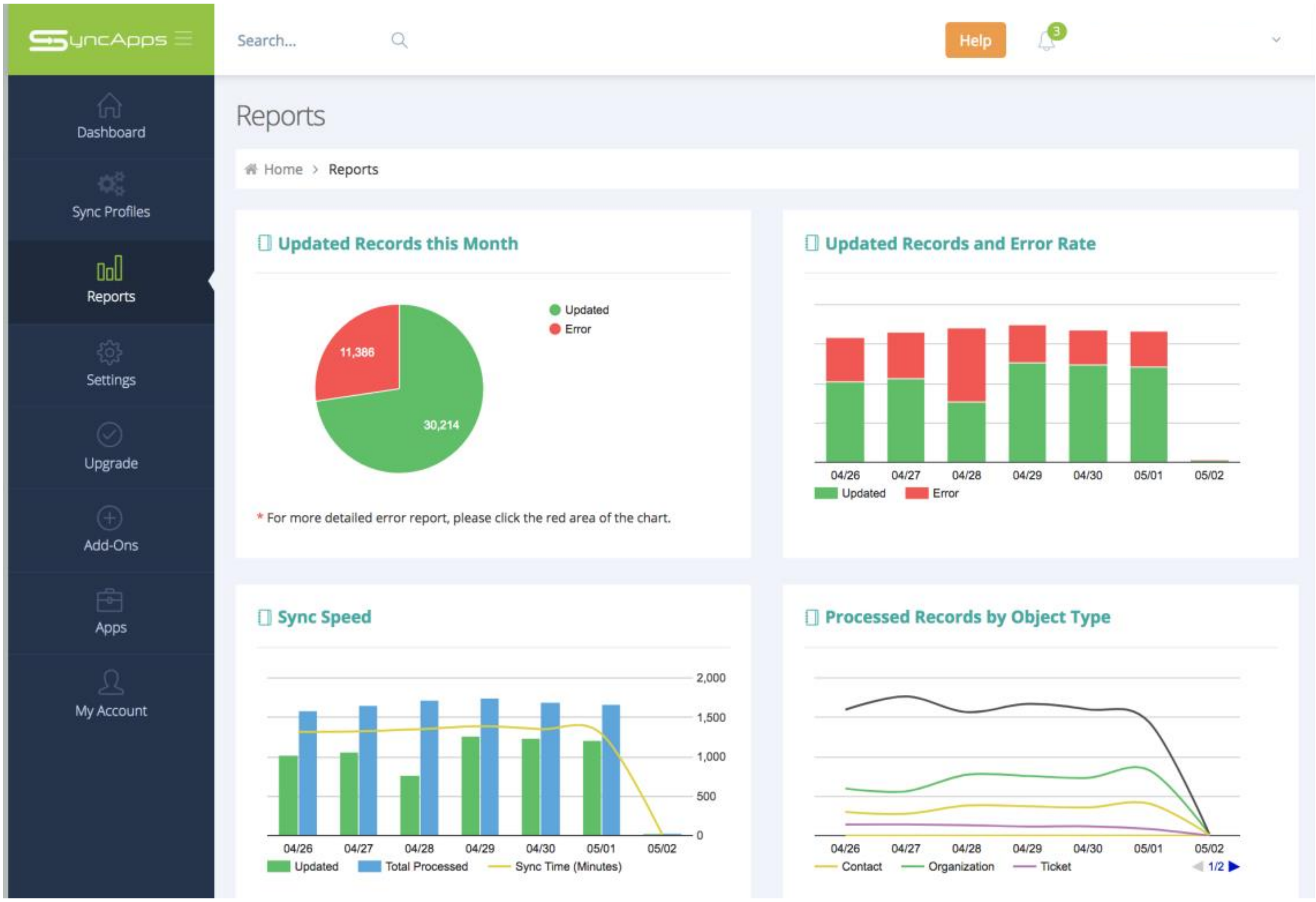
9 Reports



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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.

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