

Enabling Seamless Syncing of Knowledge Articles from Zendesk KB to Salesforce[®]

HIGHLIGHTS



Moved Historical Data
Without Any Loss



Deployed Zendesk and Salesforce
Knowledge Connector



Enabled Syncing of Knowledge
Articles to Salesforce

THE CUSTOMER

Headquartered in San Francisco, USA, the customer is a global provider of cloud-based contact center and AI software. With its offices in Portugal and North America, the company serves a global client base. They also enjoy several industry recognitions such as their inclusion in Gartner 2020 Magic Quadrant for CCaaS and Forrester Wave CCaaS Provider, Q3 2020 reports.

THE CONTEXT

The customer was using Zendesk as their knowledge base and had all their knowledge articles and help documents stored in it. But with business growth, came the need for a more dynamic customer community. And for that purpose, they decided to build their online community on Salesforce Community Cloud. They also enabled Salesforce Knowledge for their knowledge base in their Salesforce-powered community.

THE OBJECTIVE

The customer wanted to move their historical data from the Zendesk knowledge base to Salesforce Knowledge. But the challenge lied with the different data structures of both platforms. So, they were looking for help with moving the KB data from Zendesk to Salesforce. Their teams were also more comfortable using Zendesk as their knowledge base, so they decided to retain it. They wanted to enable syncing of data from Zendesk KB to Salesforce Knowledge.

THE SOLUTION

The customer approached Grazitti looking at our Salesforce-relevant expertise. They shared a set of requirements with our Salesforce experts, following which our experts did a thorough requirement analysis.

Based on the requirement analysis, our experts suggested to them our product - Zendesk and Salesforce Knowledge Connector. After giving a demo, they liked the product and asked us to deploy it for them.

After that, our product experts deployed the Zendesk and Salesforce Knowledge Connector in the systems and enabled the integration.

One-time data migration was needed to be done for moving data from Zendesk knowledge base to Salesforce Knowledge. With the connector enabled, the different data structure of Zendesk and Salesforce was no longer a challenge since the data mapping rules were configured in the connector.

A couple of problems came in the way while moving data from Zendesk KB to Salesforce, which are as following:

- There were some challenges with syncing of Labels, which we rectified from the backend.
- There were WISTIA video links in their knowledge articles and those were not supported by Salesforce. We used iFrame to convert those links into Salesforce-compliant ones.

The connector enabled their users with the following features:

- Real-time, automated syncing of knowledge articles from Zendesk to Salesforce
- Scheduled syncing based on defined time frame (daily, weekly, bi-weekly, monthly)
- Hassle-free data management without any breakages

After the data migration was completed and the Zendesk-Salesforce Knowledge connector was deployed, a stringent QA was done by our team of QE experts. Upon receiving their 'good-to-go', the system was handed over to the customer.

THE OUTCOME

One-time syncing of knowledge articles helped the customer move their historical data from Zendesk to Salesforce without much of any trouble and without causing any loss of data. Their team was now able to continue to work on Zendesk and the knowledge articles are synced to Salesforce Knowledge automatically based on the defined schedule for syncing of data.

