Informatica®

Informatica® Cloud Data Integration

Zendesk V2 Connector

Informatica Cloud Data Integration Zendesk V2 Connector
April 2023

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Preface

Use *Zendesk V2 Connector* to learn how to read from or write to Zendesk by using Data Integration. Learn to create a connection, develop mappings, synchronization tasks, and run synchronization and mapping tasks in Data Integration.

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CHAPTER 1

Introduction to Zendesk V2 Connector

You can use Zendesk V2 Connector to connect to Zendesk from Data Integration. You can use Zendesk V2 Connector to read data from and write data to Zendesk.

Zendesk V2 Connector is a REST based cloud connector. You can use Zendesk objects as sources and targets in synchronization tasks, mapping and mapping tasks.

You can switch mappings to advanced mode to include transformations and functions that enable advanced functionality.

When you run a synchronization task or a mapping task, the Secure Agents uses the Zendesk API to read data from and write data to Zendesk. You can use Zendesk objects, such as Users, Tickets, or Organizations in a task.

Data Integration Hosted Agent

You can use the Data Integration Hosted Agent (Hosted Agent) as a runtime environment for a Zendesk V2 connection if you have the Cloud Runtime license.

Data Integration Secure Agents are installed locally. As an alternative to installing a Secure Agent, you can use a Hosted Agent. Hosted Agents are hosted at Data Integration hosting facility. The Data Integration hosting facility manages the Hosted Agent runtime environment and the agents that run in it. You cannot add, delete, or configure a Hosted Agent runtime environment. Because you do not install a Hosted Agent, you do not have access to files normally stored in the Secure Agent directory, such as configuration, success, and reject files.

Zendesk V2 Connector Supported Objects

The following table lists the Zendesk objects that you can use in Data Integration tasks:

Objects	Fetch	Insert	Update	Delete	Upsert	Data Preview	Incremental Export API
ActivityStream	Yes	NA	NA	NA	NA	Yes	NA
AppLocations	Yes	No	No	No	NA	Yes	NA
Automations	Yes	NA	Yes	Yes	NA	Yes	NA
Brands	Yes	Yes	Yes	Yes	NA	Yes	NA
DynamicContent	Yes	Yes	Yes	Yes	NA	Yes	NA
GroupMemberships	Yes	Yes	No	Yes	NA	Yes	NA
Groups	Yes	Yes	Yes	Yes	NA	Yes	NA
Locales	Yes	NA	NA	NA	NA	Yes	NA
MonitoredTwitterHandles	Yes	Yes	NA	NA	NA	Yes	NA
OrganizationFields	Yes	Yes	Yes	Yes	NA	Yes	NA
OrganizationMemberships	Yes	No	NA	Yes	NA	Yes	NA
OrganizationSubscriptions	Yes	Yes	Yes	Yes	NA	Yes	NA
Organizations	Yes	Yes	Yes	Yes	NA	Yes	Yes
Requests	Yes	No	No	No	NA	Yes	NA
Sessions	Yes	NA	NA	Yes	NA	Yes	NA
SupportAddresses	Yes	Yes	Yes	Yes	NA	Yes	NA
SuspendedTickets	Yes	NA	NA	Yes	NA	Yes	NA

Objects	Fetch	Insert	Update	Delete	Upsert	Data Preview	Incremental Export API
Tags	Yes	No	No	No	NA	Yes	NA
TicketAudits	Yes	NA	NA	NA	NA	Yes	NA
TicketComments	Yes	NA	NA	NA	NA	NA	NA
TicketFields	Yes	Yes	Yes	Yes	NA	Yes	NA
TicketForms	Yes	Yes	Yes	Yes	NA	NA	NA
TicketMetricEvents	Yes	NA	NA	NA	NA	Yes	Yes
TicketMetrics	Yes	NA	NA	NA	NA	Yes	NA
Tickets	Yes	Yes	Yes	Yes	NA	Yes	Yes
Triggers	Yes	NA	Yes	Yes	NA	Yes	NA
UserFields	Yes	Yes	Yes	Yes	NA	Yes	NA
UserIdentities	Yes	Yes	Yes	Yes	NA	NA	NA
Users	Yes	Yes	Yes	Yes	NA	Yes	Yes
Variants	Yes	Yes	No	No	NA	NA	NA
Views	Yes	No	No	No	NA	Yes	NA

Consider the following guidelines when you use the Zendesk trial account:

- You cannot read data from the TicketForms object.
- You cannot write or update data to the TicketForms or the Brands object.
- You cannot delete data from the TicketForms object.

Zendesk V2 Connector assets

Create assets in Data Integration to integrate data using Zendesk V2 Connector.

When you use Zendesk V2 Connector, you can include the following Data Integration assets:

- Mapping
- Mapping task

- Synchronization task

For more information about configuring assets and transformations, see *Mappings*, *Transformations*, and *Tasks* in the Data Integration documentation.

Administration of Zendesk V2 Connector

As a user, you can use Zendesk V2 Connector after the organization administrator performs the following tasks:

- Upload the Zendesk V2 Connector, specify the name of the connector as Zendesk V2.
- Before the Agents uses Zendesk V2 Connector, create a user account in the Zendesk. The user must be an administrator of the Zendesk account.
- Do not enable the two-factor authentication as Zendesk V2 Connector uses basic authentication to authenticate the user.

For more information about the Zendesk security and authentication, see the Zendesk documentation.

CHAPTER 2

Zendesk V2 Connections

Create a Zendesk V2 connection to connect to Zendesk so that the Secure Agent can read data from and write data to Zendesk.

You create a Zendesk V2 connection on the **Connections** page. Use the connection when you create the synchronization tasks, mappings, and mapping tasks. When you create a Zendesk V2 connection, you enter connection properties specific to Zendesk.

Zendesk Custom Fields

Use Zendesk to create custom fields. You can use Zendesk V2 Connector to read data from the custom fields that are present in the following Zendesk objects:

- Organizations
- Tickets
- Users

To read data from custom fields in Zendesk, you must configure the **Custom Field** property when you create a Zendesk V2 connection.

The following table displays the various custom fields and data types that Zendesk V2 Connector supports:

Zendesk Custom Field Type	Data Type
Checkbox	BOOLEAN
Date	STRING
Decimal	DOUBLE
Multi-line Text	STRING
Numeric	INTEGER
Text	STRING

Note: When you use the Hosted Agent as the runtime environment, you can read data from custom fields.

For more information about configuring Zendesk custom fields, click the following URL:

https://support.zendesk.com/hc/en-us/articles/203661866-About-custom-field-types

Configure proxy settings

If your organization uses an outgoing proxy server to connect to the Internet, you can use the agent to connect to Informatica Intelligent Cloud Services through the proxy server.

You can configure the Secure Agent to use the proxy server on Windows and Linux. You can use the unauthenticated or authenticated proxy server.

To configure the proxy settings for the serverless runtime environment, see *Runtime Environments* in the Administrator help.

Configuring the Proxy Settings on Windows

To configure the proxy server settings for the Secure Agent on a Windows machine, you must configure the proxy server settings through the Secure Agent Manager.

Contact your network administrator for the correct proxy settings.

1. Click **Start** > **All Programs** > **Informatica Cloud Secure Agent** > **Informatica Cloud Secure Agent** to launch the Secure Agent Manager.

   The Secure Agent Manager displays the Secure Agent status.
2. Click **Proxy** in the Secure Agent Manager page.
3. Click **Use a Proxy Server** to enter proxy server settings.
4. Configure the following proxy server details:

Field	Description
Proxy Host	Required. Host name of the outgoing proxy server that the Secure Agent uses.
Proxy Port	Required. Port number of the outgoing proxy server.
User Name	Not applicable for unauthenticated proxy server.
Password	Not applicable for unauthenticated proxy server.

5. Click **OK**.

   The Secure Agent Manager restarts the Secure Agent to apply the settings.

Configuring the Proxy Settings on Linux

You can update the proxy server settings defined for the Secure Agent from the command line. To configure the proxy server settings for the Secure Agent on a Linux machine, you must use a shell command that updates the `proxy.ini` file.

Contact your network administrator for the correct proxy settings.

1. Navigate to the following directory:

   ```
   <Secure Agent installation directory>/apps/agentcore
   ```
2. To update the `proxy.ini` file, enter the following command:

   ```
   consoleAgentManager.bat configureProxy <proxy host> <proxy port>
   ```
3. Restart the Secure Agent.

Zendesk V2 connection properties

When you set up a Zendesk V2 connection, configure the connection properties.

The following table describes the Zendesk V2 connection properties:

Property	Description
Connection Name	Name of the connection. Each connection name must be unique within the organization. Connection names can contain alphanumeric characters, spaces, and the following special characters: _ . + -, Maximum length is 255 characters.
Description	Description of the connection. Maximum length is 4000 characters.
Type	The Zendesk V2 connection type.
Runtime Environment	Name of the runtime environment where you want to run the tasks. Specify a Secure Agent, Hosted Agent, or serverless runtime environment.
Username	Username of the Zendesk account.
Password	Password of the Zendesk account.
URL	URL of the Zendesk account. Specify the complete URL. For example, https://informaticabusinesssolution13.zendesk.com/api/v2.
Enable Logging	Select the checkbox to enable logging.
Use Proxy	Connects to Zendesk through proxy server. Select the checkbox to use proxy server.
Custom Field	Specify custom fields for Zendesk objects.

Rules and guidelines for custom fields

Consider the following rules and guidelines when you configure a custom field:

- Specify the custom fields in Zendesk using the following format, where FieldKey is value of the **Field key** in Zendesk:

```
Object1=”FieldKey1,DataType,Size,Filterable,PrimaryKey”;”FieldKey2,DataType,Size,Filte
rable,PrimaryKey”
Object2=”FieldKey1,DataType,Size,Filterable,PrimaryKey”;”FieldKey2,DataType,Size,Filte
rable,PrimaryKey”
```

  For example, you can specify the following custom fields for Organizations and Users objects:

```
Organizations="support_description,String,255,true,false"
Users="problems,String,255,true,false";age,Double,0,true,false";"required,Boolean,0,tr
ue,false";"select,
String,255,true,false";"support_description,String,255,true,false";"reg_ex,String,255,
true,false"
```

- When you specify a custom field for Tickets object, you must specify the custom fields in the following format:

```
Tickets=”CF_FieldID1,DataType,Size,Filterable,PrimaryKey”;”CF_FieldID2,DataType,Size,F
ilterable,
PrimaryKey”
```

For example:

```
Tickets="CF_360003199614,String,255,true,false;"CF_360003373654,String,255,true,false"
```

- Specify the custom fields for different objects in a new line.
- When you specify multiple custom fields for an object, you must separate each custom field with a semicolon (;).
- If you specify a size for a custom field, the agent considers the size of only the string data type. You must set the size for custom fields of other data types as zero.
- The field key in a custom field must not contain special characters.
- To find the field key for Tickets object in the Zendesk website, go to **Settings** > **Manage Ticket Fields**.

CHAPTER 3

Synchronization Tasks with Zendesk V2

Use a Synchronization task to synchronize data between a source and target.

You can configure a synchronization task using the Synchronization Task wizard. You can use Zendesk V2 objects as sources or targets objects.

When you create a task, you can associate it with a schedule to run it at specified times or on regular intervals. Or, you can run it manually. You can monitor tasks that are currently running in the activity monitor and view logs about completed tasks in the activity log.

Zendesk V2 Sources in Synchronization Tasks

You can use a Zendesk object as a single source in a synchronization task.

You can configure Zendesk source properties on the **Source** page of the Synchronization Task wizard.

The following table describes the Zendesk source properties:

Property	Description
Connection	Name of the Zendesk V2 source connection.
Source Type	Select **Single** or **Multiple** as the source type. Select **Single** to read data from a standard Zendesk object. Select **Multiple** to read data from a standard Zendesk object and add a single child object. **Note:** When you select **Multiple** as the source type, you cannot add a sibling object. The sibling object appears as a column of the child object and contains a value of string data type.
Source Object	Name of the Zendesk source object.

Advanced Source Properties for Zendesk V2

You can configure advanced source properties on the **Schedule** page of the Synchronization task wizard.

You can perform incremental data export for a Zendesk object by selecting the **Is Incremental Export** check box under the advanced source properties. Zendesk V2 Connector supports incremental data export for the following Zendesk objects:

- Organizations

- Tickets
- TicketMetricEvents
- Users

Data Filters

Data filters help you to fetch specific data of a particular object. You can assign a filter field to the object, and the synchronization task processes the data.

Perform the following steps to use data filters:

1. In a synchronization task, select the **Data Filters** tab.
2. Click **New**.

   The Data Filter dialog box appears.
3. Enter the data filter fields as described in the following table:

Field Type	Description
Object	Select object for which you want to assign filter fields.
Filter By	Select the filter field.
Operator	Select the corresponding operator.
Filter Value	Enter the filter value.

4. Click **OK**.

You cannot assign data filters when you use the following Zendesk objects in a synchronization task:

- Tags
- Requests

Rules and Guidelines for Data Filters

Consider the following rules and guidelines when you configure data filters:

- You cannot configure advanced data filters using Zendesk V2 Connector.
- If you use Variants, UserIdentities, TicketComments, TicketAudits, TicketMetricEvents, or DynamicContent as the source object, it is mandatory to assign data filters.
- When you configure a data filter for a field of Date data type, you must not specify the timestamp.
- If you select the **Is Incremental Export** advanced source property, you must provide a data filter only for **Updated_At** field in GMT format.

  Note: You must not provide data filters for any other field.

Zendesk V2 Targets in Synchronization Tasks

You can use the insert, update, and delete operations for a Zendesk target in a synchronization task.

When you perform an insert operation, define the source data in synchronization application to write to the Zendesk target. The Secure Agent inserts the source rows that you specify into the Zendesk target.

When you perform an update operation, define the source data in the synchronization application to update the records in the Zendesk target. The Secure Agent updates the rows that you specify in the Zendesk target. When you perform a delete operation, define the source data in the synchronization application to delete the records in the Zendesk target. The Secure Agent deletes the records that you specify in the Zendesk target.

The following table describes the Zendesk target properties:

Property	Description
Connection	Name of the Zendesk V2 target connection.
Target Type	Select **Single** or **Multiple** as the target type. Select **Single** to write data to a standard Zendesk object. Select **Multiple** to write data to a standard Zendesk object and add a single child object. **Note:** When you select **Multiple** as the target type, you cannot add a sibling object. The sibling object appears as a column of the child object and contains a value of string data type.
Target Object	Name of the Zendesk target object.

Advanced Target Properties for Zendesk V2

You can configure advanced target properties on the **Schedule** page of the Synchronization task wizard.

You can perform bulk insert, update, and delete operations on a Zendesk object by selecting the **Batch Operation** check box under the advanced target properties. Zendesk V2 Connector supports bulk operations for the following Zendesk objects:

- Organizations
- Tickets
- Users

CHAPTER 4

Mappings and Mapping Tasks with Zendesk V2

Use the Data Integration Mapping Designer to create a mapping. When you create a mapping, you configure a source or a target to represent a Zendesk object.In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.

Validate the mapping and describe the flow of data from source and target along with the required transformations before the Secure Agent reads data from or writes data to the Zendesk object. Use the Mapping Task wizard to create a mapping task and select the mapping that you configured. The mapping task processes data based on the data flow logic you define in the mapping. Run the mapping task to read data from or write data to a Zendesk object.

Zendesk V2 Sources in Mappings

When you create a mapping, you can configure the source properties to use Zendesk objects to read the data from your Zendesk account. The source properties appear on the **Source** tab when you specify a Zendesk V2 connection. When you specify custom fields of Users and Organizations objects in the **Custom Field** connection property, the Secure Agent appends `CF_` to the custom field key and displays the custom fields in the **Field Mapping** tab.

The following table describes the Zendesk source properties.

Source Property	Description
Connection Type	Name of the Zendesk V2 source connection.
Source Type	Select **Single** or **Multiple** as the source type. Select **Single** to read data from a standard Zendesk object. Select **Multiple** to read data from a standard Zendesk object and add a single child object. **Note:** When you select **Multiple** as the source type, you cannot add a sibling object. The sibling object appears as a column of the child object and contains a value of string data type.
Source Object	Select the Zendesk source object for the task.

The following table describes the query options that you can configure in a Source transformation:

Property	Description
Filter	Filter value in a read operation. Click **Configure** to add conditions to filter records and reduce the number of rows that the Secure Agent reads from the source. Select **Not Parameterized** filter condition and use a basic filter to specify the object, field, operator, and value to select specific records. Zendesk V2 Connector does not support **Completely Parameterized** and **Advanced** filter conditions in a mapping. You cannot assign data filters when you use the following Zendesk objects in a mapping task: - Tags - Requests
Sort	Not applicable for Zendesk V2 Connector.

The following table describes the advanced properties that you configure for a Zendesk source object:

Property	Description
Is Incremental Export	Zendesk V2 Connector supports incremental data export for Tickets, TicketMetricEvents, Users, and Organizations objects. Select the check box to enable incremental export. **Note:** If you select the **Is Incremental Export** property, you must only provide data a filter for **Updated_At** field in GMT format. You must not provide data filters for any other field. For example, Updated_At Equals 2016-04-28 21:04:00
Tracing Level	Determines the amount of detail that appears in the log for the source. You can choose Terse, Normal, Verbose Initialization, or Verbose Data tracing level. Default is Normal.

Zendesk V2 Targets in Mappings

When you configure a mapping, you can use Zendesk V2 Connector as a target connection to write data to your Zendesk account. The target properties appear on the **Target** tab when you specify a Zendesk connection.

The following table describes the Zendesk target properties:

Source Property	Description
Connection Type	Name of the Zendesk V2 target connection.
Target Type	Select **Single** or **Multiple** as the target type. Select **Single** to write data to a standard Zendesk object. Select **Multiple** to write data to a standard Zendesk object and add a single child object. **Note:** When you select **Multiple** as the target type, you cannot add a sibling object. The sibling object appears as a column of the child object and contains a value of string data type.

Source Property	Description
Target Object	Select the target object for the task.
Task Operation	Select the target operation. You can perform insert, update, and delete operations with Zendesk V2 Connector.

The following table describes the advanced properties that you can configure for a Zendesk target:

Property	Description
Batch Operation	Select this property to perform bulk insert, update, and delete operations on a Zendesk object. Zendesk V2 Connector supports bulk operations for the following Zendesk objects: - Organizations - Tickets - Users
Success File Directory	Not applicable for Zendesk V2 Connector.
Error File Directory	Not applicable for Zendesk V2 Connector.
Forward Rejected Rows	Not applicable for Zendesk V2 Connector.

CHAPTER 5

Known Limitations

Zendesk V2 Connector has the following known limitations:

- When you run a mapping task to delete rows from the Users object using IDs and re-run the mapping task to delete more rows from the Users object, the Secure Agent does not displays the error rows and returns incorrect number of success rows.
- When you run a mapping to insert data into DynamicContent object, you must also add the Variants child object and ensure that the value of the default field is set to true. Otherwise, the mapping fails.

APPENDIX A

Zendesk V2 Data Type Reference

Data Integration uses the following data types in mappings, synchronization tasks, and mapping tasks with Zendesk:

Zendesk native data types

Zendesk data types appear in the **Fields** tab for Source and Target transformations when you choose to edit metadata for the fields.

Transformation data types

Set of data types that appear in the remaining transformations. They are internal data types based on ANSI SQL-92 generic data types, which Data Integration uses to move data across platforms. Transformation data types appear in all remaining transformations in a mapping, synchronization task, or mapping task.

When Data Integration reads source data, it converts the native data types to the comparable transformation data types before transforming the data. When Data Integration writes to a target, it converts the transformation data types to the comparable native data types.

Zendesk V2 and Transformation Data Types

The following table lists the Zendesk data types that Data Integration supports and the corresponding transformation data types:

Zendesk V2 Data Type	Transformation Data Type	Range
INTEGER	Double	-2,147,483,648 to 2,147,487,647 Precision 10, Scale 0
BOOLEAN	Integer	-2,147,483,648 to 2,147,487,647 Precision 10, Scale 0
DATE	Date/Time	Jan 1, 0001 A.D. to Dec 31, 9999 A.D. (Precision to the nanosecond)

Zendesk V2 Data Type	Transformation Data Type	Range
STRING	String	1 to 104,857,600 characters
DOUBLE	Double	Precision 15

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