:talkdesk®

{IntegrationName} API Manifest - {ClientName}

Talkdesk CRM Integration

Date

{ClientName} Technical Contact	Name & Email	Notes
Line one	Line two	Line three
Line one	Line two	Line three
Line one	Line two	Line three
Line one	Line two	Line three

Use Case Description

To build an integration with IntegrationName to allow contact sync, agent sync, activity logging, and automation tasks to be executed. All components and underlying functions are optional to be implemented (except for the Talkdesk Integration itself).

Components Description

Talkdesk Integration

- The Talkdesk Integrations API allows Talkdesk customers and partners to connect CRMs, support tools and other third party software where customer data is managed to their Talkdesk instances. This ensures that contact data is always up to date, and that important call-related information can be pushed to third party systems in real time.

Action Executor

- Talkdesk will execute a configured action on the bridge when a trigger of an automation where that action takes part happens on the system. Actions can also be executed from a request of a user with manually input data.

Agent Retriever

- Talkdesk will send an HTTP POST to the bridge's endpoint when an agent synchronization is needed.

Authorization Validation

- When a user activates an integration for their Talkdesk account, a POST will be made to the configured endpoint with the user's information for the configured authorization fields. The bridge should validate the credentials with the external service in order for the integration to be properly configured for the account.

Contact Retriever

- Talkdesk will send an HTTP POST to the bridge's configured endpoint when a contact synchronization is run. This request can be slightly different depending on the situation for which it is running: (Initial Sync, Incremental Sync, Next Page Sync)

Interaction Retriever

- Talkdesk's interaction updater will send an HTTP POST request to the bridge in order to retrieve a contact's interactions with the external service whenever that contact is being displayed to a user.

1: Configuring a Talkdesk Integration

Talkdesk Weblink: [Configuring a Talkdesk Integration](#)

{IntegrationName} Weblink: *(link your Integration Web Documentation for Available APIs)*

- **Authentication Type:** *Insert authentication type*
  - Available authentication types include: none, custom, oauth2
  - Array, optional when authentication_type is set to none, mandatory for custom or OAauth2
- **Keybase User Name:** *Insert username*
  - This is required for passing security credentials to/from
- **Should it be tested in the production environment?** *Yes/No*
  - If yes and the authentication type is custom or OAuth2, be prepared to provide the necessary credentials via Keybase, upon request.

Example Configuration Input: *[Click Here](#)*

TD Field Name:	Your Inputs:
name	
display_name	
description	
logo_url	
icon_url	
authentication_type	
authentication_configuration	
auth_validation_endpoint	
contact_synchronization_endpoint	
interaction_retrieval_endpoint	
agent_synchronization_endpoint	

interaction_types	

2: Implementing an Action Executor

Talkdesk Weblink: <u>Implementing an Action Executor</u>
Each individual expected action from the `"interaction_types"` field should be outlined with its own JSON

Your Actions *(Duplicate Table for Each Action):*
***Example Configuration Input**: <u>Click Here</u>*

TD Field Name:	Your Inputs:
provider	
name	
display	
description	
endpoint	
inputs	

3: Implementing an Agent Retriever

Talkdesk Weblink: <u>Implementing an Agent Retriever</u> *(aka Agent Sync)*

4: Implementing an Authorization Validator

Talkdesk Weblink: <u>Implementing an Authorization Validator</u>

WE (TD) send a request, you send the response;
Response must follow API contract for request/response
Reference examples in link above

Devs may need to build a bridge

5: Implementing a Contact Retriever

Talkdesk Weblink: [Implementing a Contact Retriever](#) *(aka Contact Sync)*

6: Implementing an Interaction Retriever

Talkdesk Weblink: [Implementing an Interaction Retriever](#)

Completed Document Instructions

After all desired functions/components above have been completed and JSON files/data input, email this document to: developers@talkdesk.com

Please include the following information:

- Subject: New Talkdesk CRM Integration
- Body:
    - Summary of integration/system, components in use, and overall objectives.
    - Talkdesk Account / Domain Name (i.e. yourOrg.mytalkdesk.com)
    - Your Keybase Username
- Attachments:
    - This document (pdf format preferred)
    - Any relevant API documentation/links for your integrating system