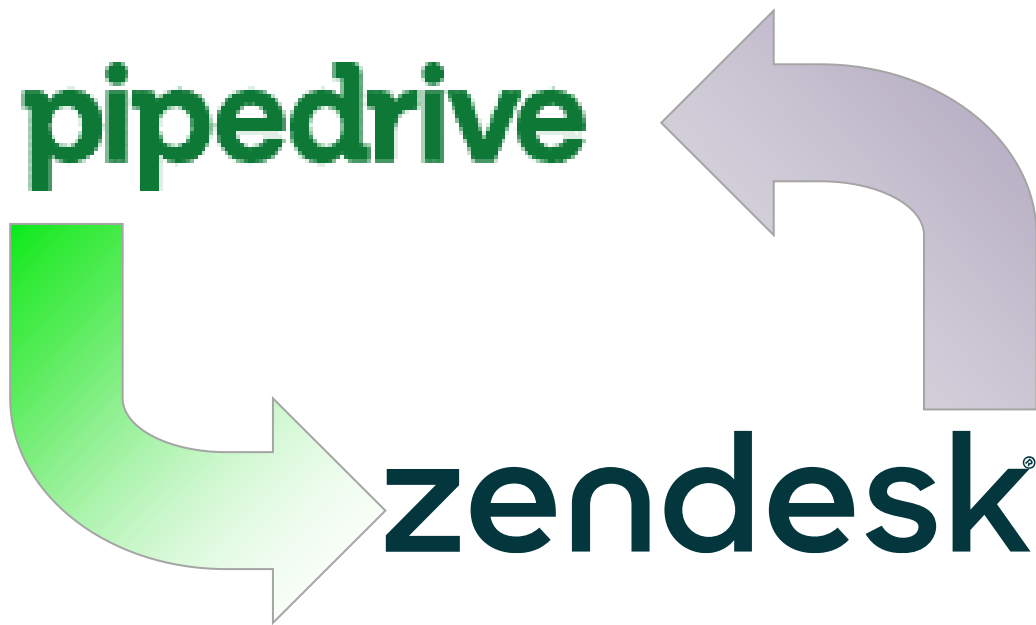


Pipedrive Zendesk Integration

Operating Manual



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Compatibilities

This software is currently compatible with any vendor supported versions of:

Pipedrive
Zendesk

Contact Us

Email: support@fayedigital.com
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Voice: 818-280-4820
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Overview

The Pipedrive Zendesk Integration by Faye brings the features you love about Zendesk and Pipedrive into one platform. Users can now effortlessly sync Organizations and Contacts across both platforms, ensuring sales and support always work from the same customer data. View Zendesk tickets inside Pipedrive and Pipedrive deals inside Zendesk, giving teams full visibility into every interaction. By connecting Zendesk's powerful support capabilities with Pipedrive's sales engine, your organization unlocks a seamless, unified customer experience that drives efficiency and stronger relationships.

Key Benefits

For Sales Teams

- **Customer Health at a Glance:** See open issues before reaching out, improving conversations and upsell opportunities.
- **Faster Collaboration:** No need to chase down support as key ticket details are right in Pipedrive.
- **Informed Deals:** Understand the full support history of a customer before closing or renewing deals.

For Support Teams

- **Context-Rich Support:** Automatically see sales info like company details and account owners in Zendesk.
- **Smarter Prioritization:** Know which tickets come from high-value customers.
- **Reduced Manual Work:** Fewer "who owns this customer?" questions thanks to synced companies and contacts.

For the Business

- **Eliminate Data Silos:** Sales and support stay on the same page.
- **Happier Customers:** Faster, more personalized service builds loyalty.
- **Increased Efficiency:** Less manual entry, fewer errors, more time for meaningful work.

Onboarding Form

When purchasing the Pipedrive Zendesk Integration from the Zendesk Marketplace the following onboarding form needs to be completed and emailed to fayeintegrations@fayedigital.com

#	Sync Requirements			Y/N	Est. # of Records	Notes & Comments
	Pipedrive	Direction	Zendesk			
1	Organizations	<-->	Organizations			
2	User	<-->	People			
3	PD Ticket App	<-	Tickets			
4	Deals	->	ZD Deal App			

Other Issues / Questions for Prospect

- A Do you have any other applications integrated with Pipedrive or Zendesk? If so, which applications and modules are syncing?

- B Are there any custom fields to be sync'd? If so, please list.

- C Are you already using/live in both Pipedrive and Zendesk? If so, there is an advanced onboarding charge.

- D Do you have user/people (contacts) associated with more than one organization?

- E Is there any other information not listed above you'd like to sync between Pipedrive and Zendesk?
If there is, it will be a customization.

- F What are the biggest wins you hope to achieve by integrating Pipedrive and Zendesk?

Installation and Configuration

The installation and configuration has three major steps:

1. Submission of the [Onboarding Form](#) for the provisioning of the integration bridge by Faye.
2. [Installation of the Zendesk Tickets App in Pipedrive](#) (URL to be provided by Faye after the integration bridge is provisioned)
3. [Installation of Pipedrive Connector App in Zendesk](#) (configuration parameters to be provided by Faye after the integration bridge is provisioned)

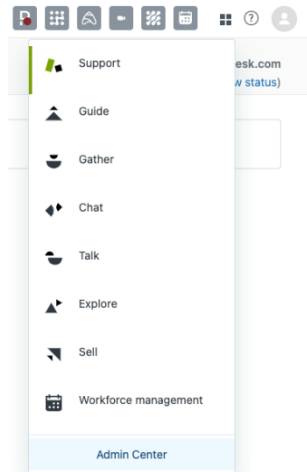
Installation of the Zendesk Tickets App in Pipedrive

1. Log into Pipedrive
2. Click on the app URL to be provided by Faye (each customer is provided their own unique URL).

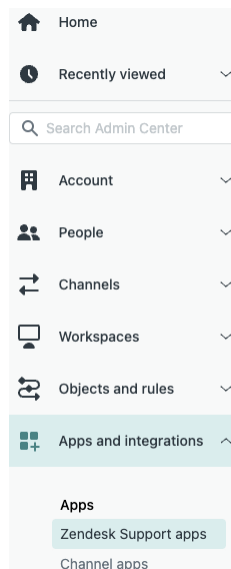
Installation of Pipedrive Connector App in Zendesk

Note: This step cannot be completed until the [Onboarding Form](#) is submitted and the integration bridge is provisioned by Faye. Upon successful provisioning, you will be provided with your configuration settings needed to complete step 6 below.

1. Log in to your Zendesk Support using an account with administrative privileges.
2. Go to the Administration page within Zendesk (Click “Admin Center” in the upper right corner).



3. In Left Menu click on “Apps” link and then under “Apps” section click on “Zendesk Support Apps”



4. Click on Upload private app

My Apps

Marketplace

Upload private app

Currently Installed

Private Apps

Settings

Filter apps

Reorder apps

Enabled apps

Enabled apps in your Zendesk

- For App Name enter for example “Pipedrive Connector”, and upload provided Zendesk package file and wait file to be uploaded and after that click on “Upload” button

Upload App

This is where you upload your private apps. Private apps appear in your account only. If you want to submit a public app or learn more about how to build your own private app, check out our [Developer documentation](#).

App Name* (required)

Pipedrive Connector

This is seen when you list your app. Please follow the [naming guidelines](#).

App File*

Choose File

Must be a .zip file. Max file size 2 MB.

Do not include any secret passwords, keys, or tokens in your app's assets directory. Access to these files is not authenticated. See [Secure Settings](#) for more information.

Cancel

Upload

- You will get warning popup that app is not approved by Zendesk which is fine, and click on “Upload” again

Creating a new App

Please be aware that the app you are attempting to upload has not been reviewed or approved by Zendesk for use in connection with your Zendesk account. Please also be aware of the following:

- It may not operate as intended
- If you have obtained this from a third party, it may have been developed in breach of our Terms of Service and Developer and API License
- It may include malicious software which could materially or adversely impact your data and your Zendesk account
- Any functionality associated with this App may be limited or disabled by future modifications to Zendesk

By clicking Upload, you agree to the above language and the [Zendesk Marketplace Terms of Use](#).

Cancel

Upload

- On next page, change title if you want, and enter Middleware Host Url and Middleware Access token with provided values and click “Install”. You can ignore other parameters for now. Be aware that Middleware Access Token once saved will not be visible.

Version: 1.0.0
Framework Version: 2.0
Email: support@fayebssg.com
Location: Ticket, User Profile, Organization Profile

INSTALLATION

Title*

Middleware Host Url*
Please enter middleware host url.

Field is required

Middleware Access Token*
Please enter middleware access token.

Items Per Page*
Please enter number of items to show per page.

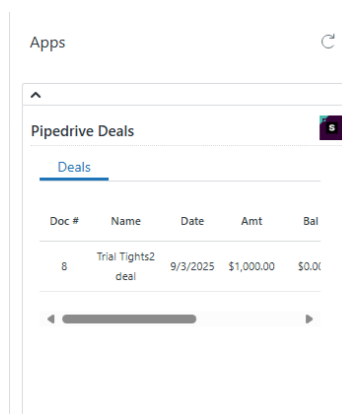
☐ Debug?
Should log errors. If you are not debugging issues, turn this option off.

☐ Enable role restrictions?
Select the roles that should have access to this app:

☐ Enable group restrictions?
Select which groups should have access to this app:

By installing this app you hereby agree to the [Zendesk Marketplace Terms of Use](#).

- Open now any ticket, user or organization and in sidebar you should be able to see Pipedrive Deals app



Standard Syncs

Pipedrive Organizations to/from Zendesk

This is a two-way sync between Pipedrive and Zendesk. Organizations created or modified in one system will automatically sync to the other. This sync is triggered when an organization is saved.

Notes:

1. The following scenarios can prevent a Customer from successfully syncing from Pipedrive to Zendesk due to record validation logic within Zendesk:
 - a. More than one Organization with the same domain/website address (only the “first” record in order of processing will sync)
 - b. An invalid URL in the website field

For the default mapping please see [Pipedrive Organization - Zendesk Organization Mapping](#)

Pipedrive People to/from Zendesk End Users

This is a two-way sync between Pipedrive People and Zendesk End Users. This sync will create and update records in both systems.

Notes:

1. The following scenarios can prevent a contact from successfully syncing from Pipedrive to Zendesk due to record validation logic within Zendesk:
 - a. Email address is invalid
 - c. Email address exists on another Contact record (only the “first” record in order of processing will sync)

For the default mapping please see [Pipedrive People – Zendesk End Users Mapping](#)

Pipedrive Deals App in Zendesk

This feature allows Zendesk users to see Pipedrive Deals and Products in an app that appears when viewing a Ticket, User or Organization.


Confectionary Containers

Actions ▾

Tickets (2) Users (2) Related

☐	Ticket status	ID	Subject	Requester	Requested	Updated	Group	Assignee
Status Category: Open								
☐	Open	#2716	Sugar is down	Sarah Barnes	Today 07:18	Today 07:21	Tier 1 Support	Paige Wheeler
Status Category: Pending								
☐	Pending	#2715	Need help setting up a new role	Dan Arrow	Today 06:03	Today 06:17	Legal	Jack Heginbottom

Apps

Pipedrive Deals

Deals

Doc #	Name	Date	Amt	Bal
8	Trial Tights2 deal	9/3/2025	\$1,000.00	\$0.00

Zendesk Tickets App in Pipedrive

This feature allows Pipedrive users to see Zendesk Tickets in an app that appears when viewing an organization or person record. Clicking on the Ticket ID will take the user to the ticket in Zendesk as long as the user has a Zendesk license. Clicking on the Subject will trigger an AI-generated ticket summary with an overview, customer sentiment, and key highlights compiled from Zendesk messages and notes.

Contacts / Organizations

Confectionary Containers

Summary

Details

People

Dan Arrow

Sarah Barnes

View details

Zendesk Tickets

Ticket ID	Subject	Status
2716	Sugar is down	Open
2715	Need help setting up a new role	Pending

Ticket Summary

Ticket Summary

Generated at: 9/4/2025, 10:18:56 AM

Overview

The customer needs help setting up a new role for an outside consultant in their Sugar instance. The agent has created a role called 'Marketing Consultant' with the required permissions.

Customer Sentiment

Sentiment: positive

Urgency: low

The agent successfully addressed the customer's request by creating the required role, leading to a positive sentiment.

Key Points

- Customer needs a new role set up for an outside consultant in Sugar instance
- Role should have permissions to view accounts, contacts, leads, and opportunities
- Agent created a role named 'Marketing Consultant' with necessary permissions

Notes:

- Clicking on the Subject field of a ticket in the ZD Tickets app in Pipedrive produces an AI-generated ticket summary. Each ticket summary consumes about 1,000 - 1,200 AI tokens and each customer is limited to 5 million tokens per month (i.e. roughly 5,000 ticket summary requests per month).

Additional tokens can be purchased in advance.

Default Field Mappings

Pipedrive Organization - Zendesk Organization Map

PIPEDRIVE ORGANIZATIONS	SYNC DIRECTION	ZENDESK ORGANIZATIONS
Name	← →	Name
Website	← →	Domain

Pipedrive People - Zendesk End User Map

PIPEDRIVE PEOPLE	SYNC DIRECTION	ZENDESK USERS
Name	← →	Name
Email (Work)	← →	Email

Pipedrive Deals App in Zendesk Map

PIPEDRIVE DEALS	SYNC DIRECTION	ZENDESK APP WINDOW
ID	→	Deal #
Name	→	Name
Value	→	Amt
Stage	→	Stage
Expected Close Date	→	Exp. Close Date
Owner	→	Sales Rep

Zendesk Ticket App in Pipedrive Map

PIPEDRIVE TICKET APP	SYNC DIRECTION	ZENDESK TICKETS
Ticket Number (would be nice if this is clickable and link back to the Zendesk ticket for PD users that also have ZD credentials)	←	Ticket ID
Subject	←	Subject
Status	←	Status
Priority	←	Priority
Requester	←	Requester (who submitted ticket)
Assignee	←	Assignee (Support agent handling)
Created Date	←	Created At
Last Updated	←	Updated At

Additional Technical Notes

1. Customers can request up to 10 custom fields to be mapped.
2. Clicking on the Subject field of a ticket in the ZD Tickets app in Pipedrive produces an AI-generated ticket summary. Each ticket summary consumes about 1,000 - 1,200 AI tokens and each customer is limited to 5 million tokens per month (i.e. roughly 5,000 ticket summary requests per month).
Additional tokens can be purchased in advance.