

ClickDesk CRM - Agile CRM

ClickDesk is an awesome combo of Live-Chat, VoIP & Video, Social Toolbar, Email Help Desk & Web Conferencing - everything that you need to convert your web visitors while keeping them happy.

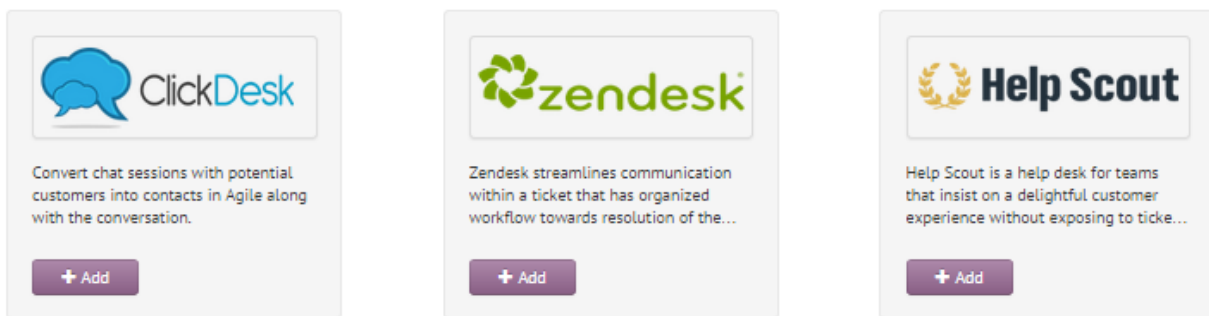
Agile CRM integrates with ClickDesk to address all your customer tickets right from the CRM. You can collaborate with your team and solve customer tickets with ease.

Here's a detailed setup description of Agile's ClickDesk integration:

1. Locate the widget

Add the widget from '+ Manage Widgets' button on any contact page, or go to Preferences page ---> Widgets and locate the ClickDesk widget under the Customer Support section. Click on the '+Add' button to integrate ClickDesk with Agile.

Customer Support [View tickets and chats](#)



The screenshot shows a 'Customer Support' section with three widget options:

- ClickDesk:** Convert chat sessions with potential customers into contacts in Agile along with the conversation. + Add
- zendesk:** Zendesk streamlines communication within a ticket that has organized workflow towards resolution of the... + Add
- Help Scout:** Help Scout is a help desk for teams that insist on a delightful customer experience without exposing to ticke... + Add

2. Link your ClickDesk account

Upon clicking the '+Add' button on the widget, a new window opens up. Enter your ClickDesk User Name (Account owner email) and 'API key' in the fields shown in the image. (For API key, login to your ClickDesk account & go to Admin Settings ---> ClickDesk API key.) Copy the API key and paste it in the 'API key' field shown. Save the details and you are done with the ClickDesk integration.

Preferences

Personal Settings

Email

Email Templates

Notifications

Widgets

Data Sync



Convert chat sessions with potential customers into contacts in Agile along with the conversation.


Enter your ClickDesk details

Save

Cancel

3. Answer Live Chats and solve customers tickets

Open any contact's page in Agile CRM to find all the chats and tickets related to him, in a handy widget on the right side. You can create new tickets, manage tickets and also check history of all the tickets related to a contact through the ClickDesk widget. Agile is now the new generation ClickDesk CRM.

 **ClickDesk**


Conversations and tickets related to Mike Wesoloh

Chats **Tickets**

Ticket created by mike@weseloh.net
2 months ago **new**

Help with Web-to-Lead Form Widgets
2 months ago **new**

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 **ClickDesk**

Conversations and tickets related to Mark Valles

Chats **Tickets**

can i get a beta trial?
4 months ago **broadcast**

Social Media Integration plugin details?
4 months ago **broadcast**

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Related Links:

[ClickDesk Integration - Agile CRM](#)

[Zendesk Integration - Agile CRM \(blog\)](#)

[HelpScout Integration - Agile CRM](#)