

TOPdesk connection with ROGER365.IO



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Version 1.2



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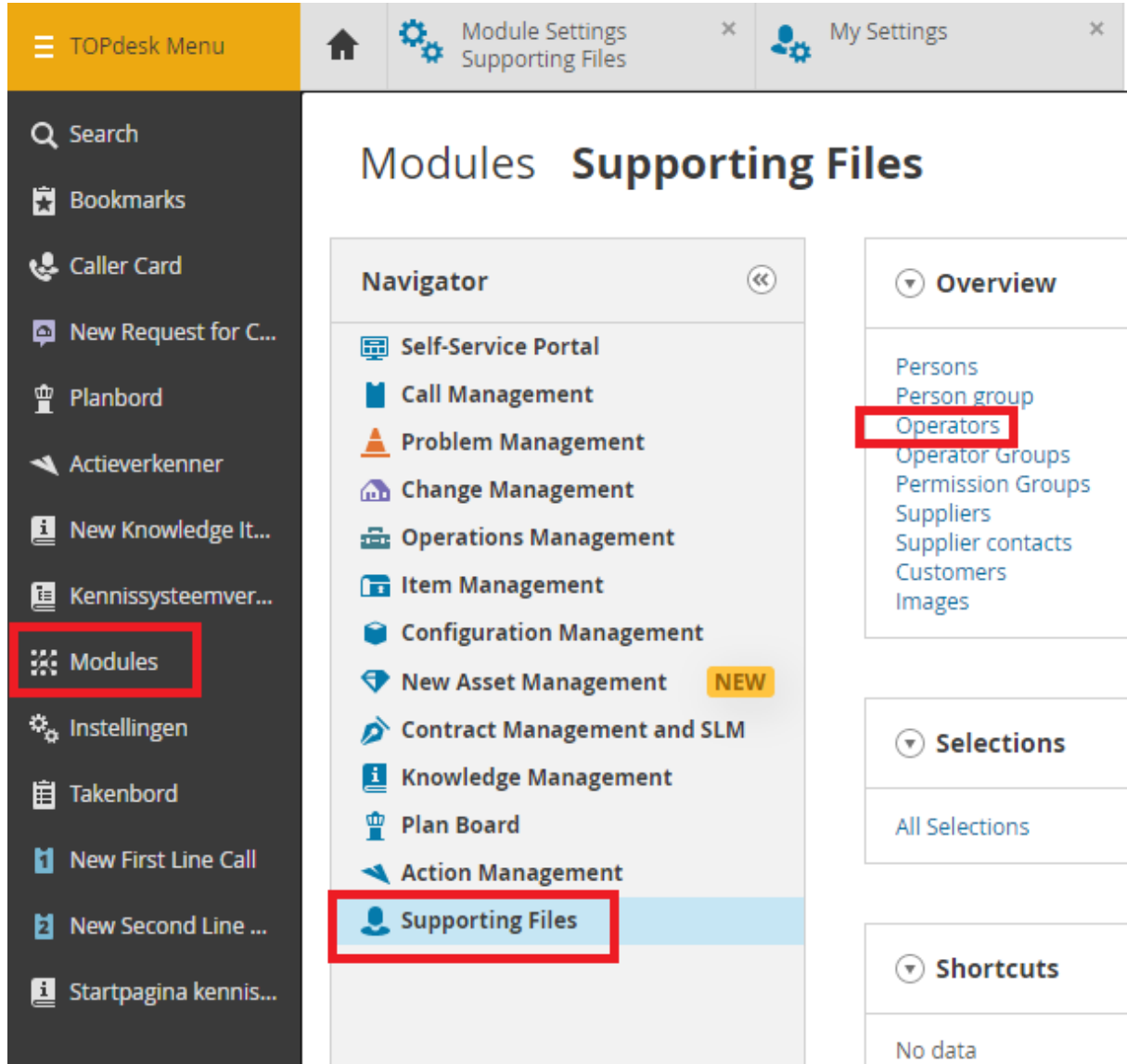
High-level overview of the steps

The configuration manual is made for TOPdesk 7.11.005 and higher. For older versions please consult the TOPdesk documentation.

- 1) Create a TOPdesk operator user
- 2) Create a TOPdesk permission group with API Access
- 3) Place user in new group
- 4) Configure ROGER365.IO

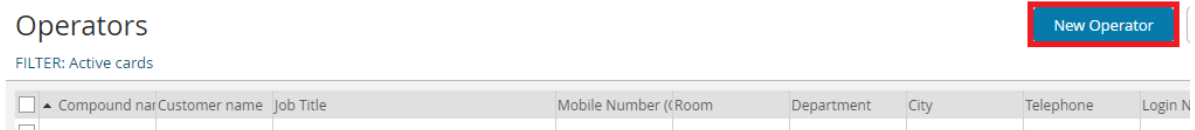
Create TOPdesk operator

Login with a user with administrator right into TOPdesk and choose modules > supporting files > Operators. The user must be a basic TOPdesk user, or a user with an application password. In this manual we will use a basic Topdesk user. For information about Topdesk authorization keys, the Topdesk site can be consulted.



The screenshot shows the TOPdesk interface. On the left is a dark sidebar with a 'TOPdesk Menu' header. The 'Modules' option is highlighted with a red box. The main area is titled 'Modules Supporting Files'. A 'Navigator' panel on the left lists various modules, with 'Supporting Files' highlighted by a red box. On the right, the 'Overview' section lists several categories, with 'Operators' highlighted by a red box. Below 'Overview' are sections for 'Selections' (showing 'All Selections') and 'Shortcuts' (showing 'No data').

Choose the new operator button



The screenshot shows the 'Operators' page. At the top right, there is a 'New Operator' button highlighted with a red box. Below the title, there is a filter 'FILTER: Active cards'. A table with columns for 'Compound na Customer name', 'Job Title', 'Mobile Number (Room)', 'Department', 'City', 'Telephone', and 'Login N' is visible.

And create a new operator user like shown below



Module Settings Supporting Files

My Settings

Modules Supporting Files

Operators

Roger365.io, CRM sync Operator

2

Operator Roger365.io, CRM sync

Save

New

More

GENERAL

INFORMATION

OPERATOR GROUPS

AUTHORIZATION (1)

FILTERS

IMAGES

LINKS

NOTES

General

Surname

Roger365.io

First Name(s)

CRM sync

First Initials

Prefixes

Birth Name

Title

Gender

Language

Nederlands

Location

Customer

Roger365.io

Customer Reference No.

607788

Room

City

Delft

TOPdesk Login

Login Name

RIOCRM

Login Permission

☒

Operator Profile

Copy operator profile

CR

Contact Details

Telephone

Mobile Number

Fax Number

Email

Exchange Account

☒ Same as email

Details

Job Title

Department

Employee Number

Hourly Rate

€ 0.00

euro

Network Login Name

Mainframe

Tasks

☐ Installer

☐ External Help desk Party

☐ First Line Call Operator

☐ Contract Manager

☐ Second Line Call Operator

☐ Operations Operator

☐ Problem Manager

☐ Operations Manager

☐ Problem Operator

☐ Knowledge Base Manager

☐ Change Coordinator

☐ Account Manager

☐ Change Activities Operator

☐ Request for Change Operator

☐ Extensive Change Operator

☐ Simple Change Operator

Don't forget to set the TOPdesk login! Save these credentials for later usage.

TOPdesk Login

Login Name

Login Permission

☒

Login data

Login Name

New Password

Repeat password

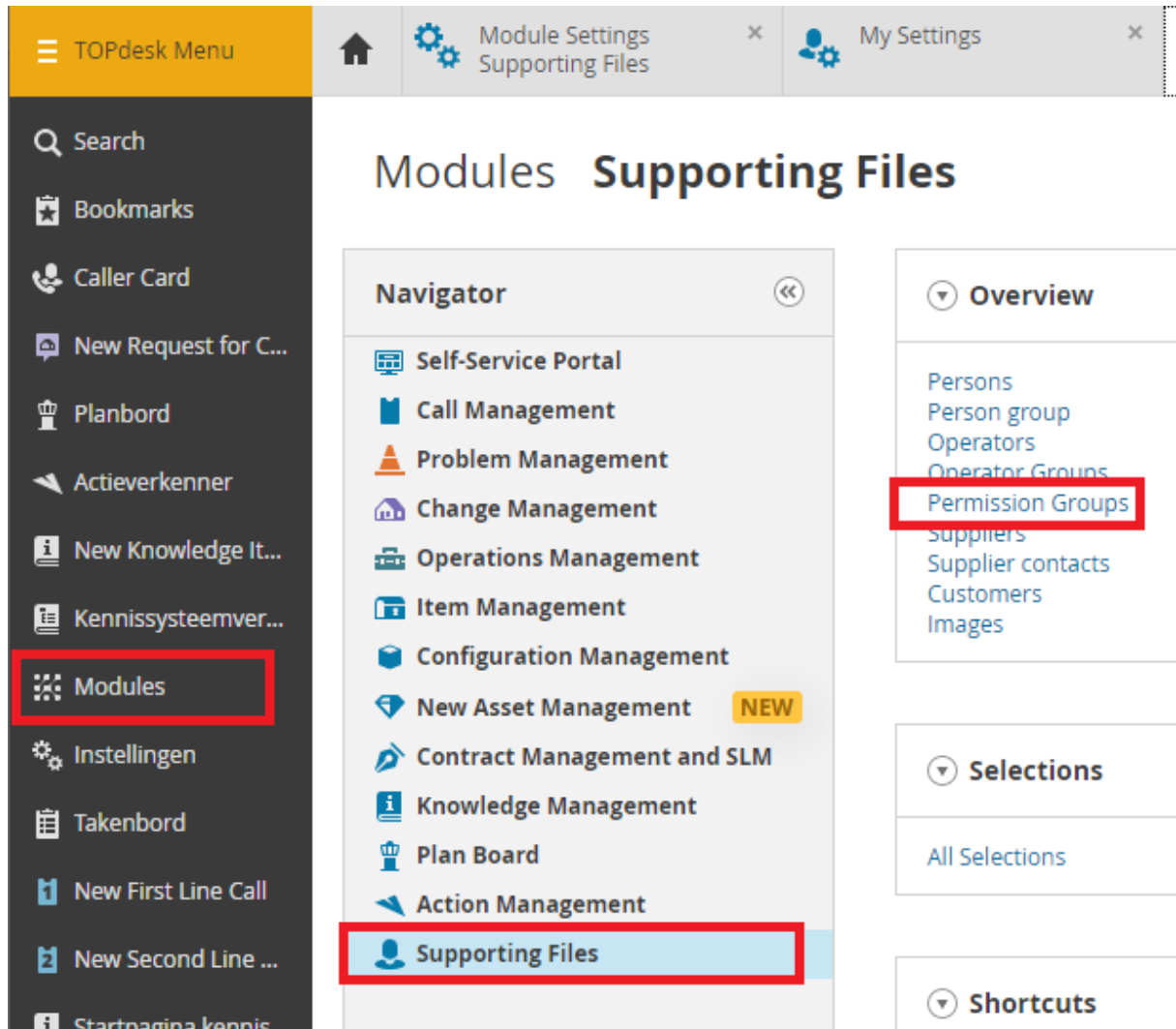
Delete

OK

Cancel

Create TOPdesk permission group

choose modules > supporting files > Permission Groups



The screenshot shows the TOPdesk interface. On the left is a dark sidebar menu with various options. The 'Modules' option is highlighted with a red rectangle. In the main content area, the 'Supporting Files' section is active, and the 'Permission Groups' link is highlighted with a red rectangle. The 'Overview' section on the right lists various entities, including 'Permission Groups' which is also highlighted with a red rectangle. The 'Supporting Files' section in the main area lists various modules, with 'Supporting Files' at the bottom highlighted with a red rectangle.

Create a permission group with the following settings

Permission Group **Api-access-CRM**

GENERAL OPERATORS (2) NOTES

Api-access-CRM

Authorization

Collapse all

- ▶ Self-Service Portal
- ▶ Services
- ▶ **Call Management**
- ▶ Problem Management
- ▶ Change Management
- ▶ Operations Management
- ▶ Item Management
- ▶ Configuration Management
- ▶ Contract Management and SLM
- ▶ Knowledge Base
- ▶ Plan Board
- ▶ **Supporting Files**
- ▶ Reports & Selections
- ▼ **Reporting API**

	Read	Write	Create	Delete	Archive	Create Selection
Apply to all	☒	☐				
REST API	☒					
Use application passwords 		☐				

- ▶ Settings

▼ **Call Management**

	Read	Write	Create	Delete	Archive	Create Selection
Apply to all	☐	☐	☐	☐	☐	☐
First line calls	☒	☐	☐	☐	☐	☐
Second line calls	☒	☐	☐	☐	☐	☐
Standard Solutions	☐	☒	☒	☒	☒	☒
Escalate calls		☐				
Close calls		☐				
Use Closure Wizard	☐					
Link Object to call		☐				
Reports on calls	☐	☒	☒	☒	☒	
KPIs for calls	☐	☒	☒	☒	☒	
Create checklist template 			☐			
Call Management Settings 	☐	☒				

Supporting Files

	Read	Write	Create	Delete	Archive	Create Selection
Apply to all	☐	☐	☐	☐	☐	☐
Persons	☒	☐	☐	☐	☐	☐
Person group	☒	☐	☐	☐	☐	☐
Operators	☐	☒	☒	☒	☒	☒
Operator Groups	☐	☒	☒	☒	☒	☒
Permission Groups 	☐	☒	☒	☒	☒	☒
Suppliers	☐	☒	☒	☒	☒	☒
Supplier contacts	☐	☒	☒	☒	☒	☒
Customers	☒	☐	☐	☐	☐	☐
Rooms	☐	☒	☒	☒	☒	☒
Images	☐	☒	☒	☒		☒
Filters	☐	☒	☒	☒		
Login data		☐				
Person private tab	☐	☒				
Person contract tab	☐	☒				
Person Password generator		☐				
Reports on Persons	☐	☒	☒	☒	☒	
Supporting Files Settings 	☐	☒				

After the creation of the permission group, the new operator user (created earlier) has to be added to the permission group. This is done on the operator tab in the permission group. Add the operator user to the permission group with the links wizard button.

Permission Group
Api-access-CRM

Save

Create
More

GENERAL
OPERATORS (2)
NOTES

FILTER: Active cards

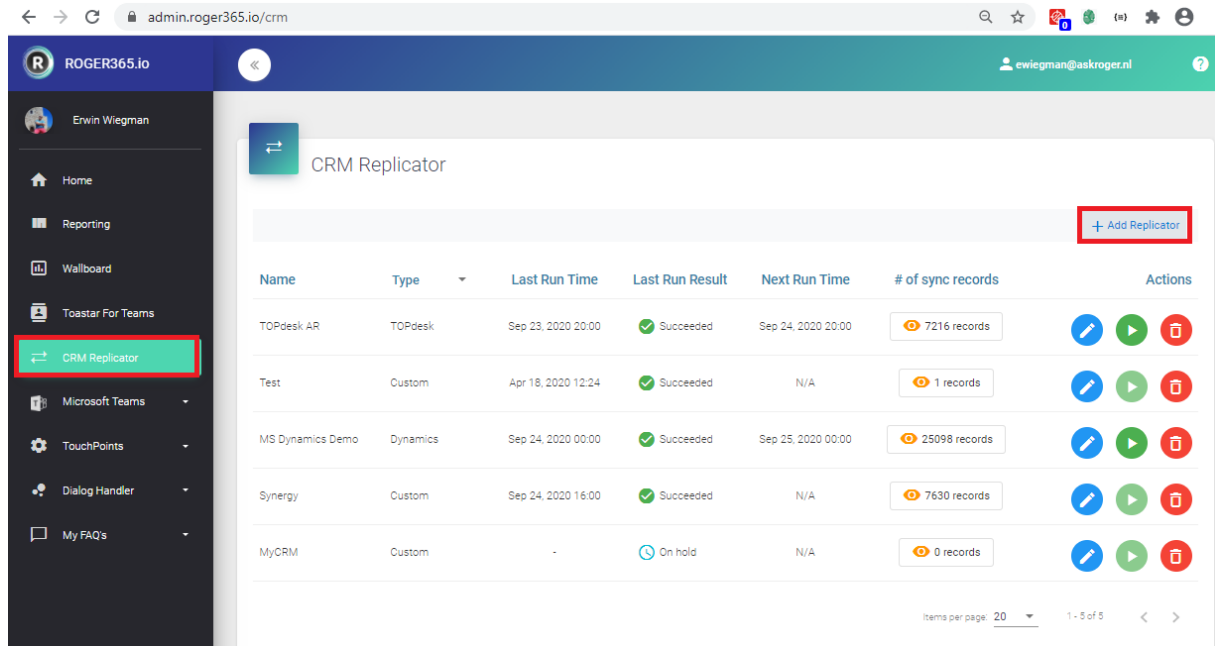
Links Wizard

More


☐ Job Title	Mobile Number (Login Name)	Compound name Room	Department	City	Customer name	Telephone	
☐		RIOCRIM	Roger365.io, CRM		Delft	Ask Roger1 BV	

Creating the TOPdesk CRM replicator

In the ROGER365.IO portal choose the CRM replicator option and choose the + add replicator



The screenshot shows the ROGER365.io CRM Replicator interface. The left sidebar contains a navigation menu with the following items: Home, Reporting, Wallboard, Toaster For Teams, CRM Replicator (highlighted with a red box), Microsoft Teams, TouchPoints, Dialog Handler, and My FAQs. The main content area is titled 'CRM Replicator' and features a '+ Add Replicator' button in the top right corner, also highlighted with a red box. Below this is a table listing existing replicators.

Name	Type	Last Run Time	Last Run Result	Next Run Time	# of sync records	Actions
TOPdesk AR	TOPdesk	Sep 23, 2020 20:00	✓ Succeeded	Sep 24, 2020 20:00	7216 records	[Edit] [Run] [Delete]
Test	Custom	Apr 18, 2020 12:24	✓ Succeeded	N/A	1 records	[Edit] [Run] [Delete]
MS Dynamics Demo	Dynamics	Sep 24, 2020 00:00	✓ Succeeded	Sep 25, 2020 00:00	25098 records	[Edit] [Run] [Delete]
Synergy	Custom	Sep 24, 2020 16:00	✓ Succeeded	N/A	7630 records	[Edit] [Run] [Delete]
MyCRM	Custom	-	⏸ On hold	N/A	0 records	[Edit] [Run] [Delete]

At the bottom right of the table, there is a pagination control showing 'Items per page: 20' and '1 - 5 of 5'.

Give the replicator a Name and choose the type TOPdesk from the pull-down menu. If done correctly, the screen changes to the screen below.



Create a new Replicator

Name *

Topdesk

Description

Topdesk example replicator

Connection configuration

Type *

TOPdesk

Connection Url *

☐

Use Application Password

Username *

Password *

Replication configuration

Start Time *

Frequency *

Day

Interval *

10

Contact Url *

Country Code *

Netherlands (+31)

CANCEL

SAVE

In this screen all the configuration from the previous steps will be used. To use an application password the toggle button must be activated.

Setting	Value
Connection URL	URL to your TOPdesk installation for example: https://topdesk.roger365.com/tas/api/
Username	Username of the TOPdesk operator user made earlier (or the user where the authentication key is created)
Password	Password of the TOPdesk operator user made earlier (or the authentication key)
Contact URL	URL to your TOPdesk installation for example: https://topdesk.roger365.com/tas/secure/contained/mango/callercard?action=new&field0=personid&value0={contactid}
Country Code	All phone numbers must be in E164 format. This setting gives the default country if local phone numbers are used. For more information see ask.roger365.io