Getting started with Ideolve integration

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Step 1: Sign up on Ideolve

1. Sign up for Ideolve (https://skyconnect.mithi.com/wp-content/uploads/sites/5/2020/04/1-sign-up-on-ideolve.gif) using email id on your official domain. This email id is the primary contact for your organization and will be required in further steps.

2. Login with helpdesk@<domain>

3. Login to Ideolve and Create a work-space (https://skyconnect.mithi.com/wp-content/uploads/sites/5/2020/04/2-create-workspace-and-invite-users.gif) that will receive the tickets.

4. Update workspace controls (https://docs.mithi.com/home/dlp-data-loss-prevention-advanced-security-documents-ideolve#workspace-level-controls)and default note controls to secure access and content.

5. Invite all the users (https://docs.mithi.com/home/how-to-create-and-manage-workspaces-in-ideolve#send-an-invitation%C2%A0to-join-workspaces)in all the teams to the workspace.

6. Create groups (https://docs.mithi.com/home/how-to-create-and-manage-workspaces-in-ideolve#create-workspace-user-groups) to map the different teams. These will be used in the Freshdesk webhook.

7. Add team members to all the groups.

Step 2: Collect Freshdesk credentials to be shared for Ideolve API key generation

Get the following information from Freshdesk to be shared with the Ideolve team for configuring the access via API:

A. Freshdesk URL

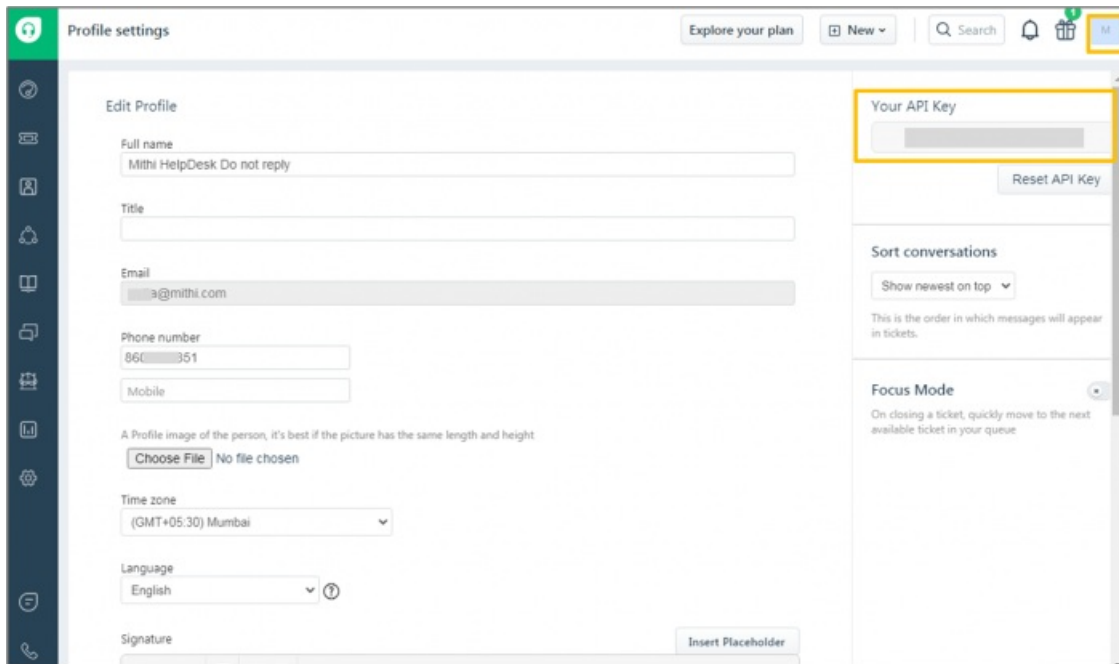B. API key for freshdesk user

C. Freshdesk user details

A. Get the Freshdesk URL

1. Log in to Freshdesk and go to **Admin**
2. From the **Support Channels** choose the **Portals** option
3. Click on the name of your portal
4. The **Portal URL** box holds the Freshdesk URL.
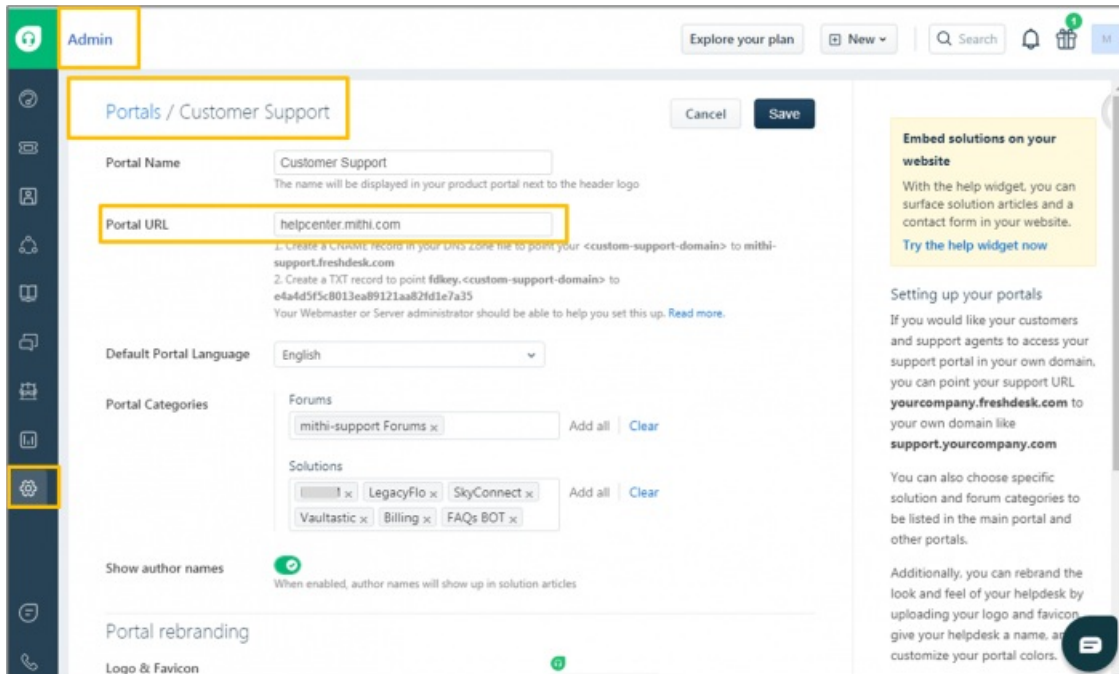
B. API key for Freshdesk user

1. On the top-right corner of your Freshdesk interface, click the user icon, and choose the **Profile Settings** option.
2. The right pane will show the **API key** for use.

C. Freshdesk user details

1. On the top-right corner of your Freshdesk interface, click the user icon, and choose the **Profile Settings** option.
2. The left pane shows the user details
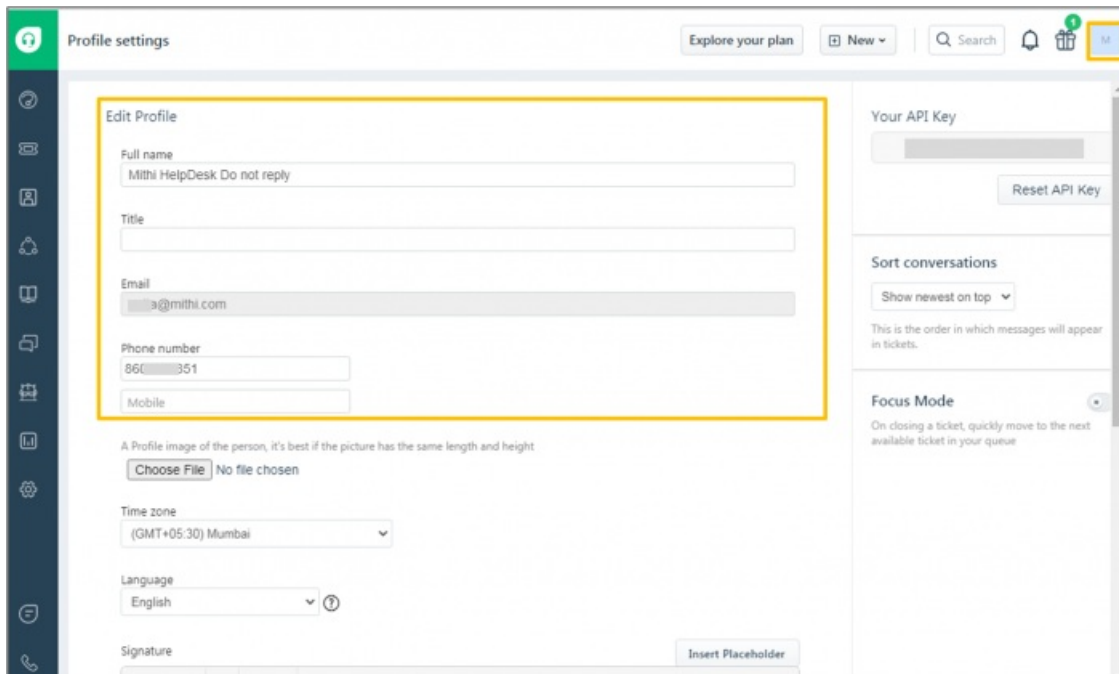
Step 3: Get the Ideolve API Key

Write to sales@mithi.com to get the API key.

The following details are required to generate the API key:

1. Information collected in step 2 above

2. Email id of the primary contact

3. The workspace name created

Step 4: Configure Freshdesk webhooks

To configure Freshdesk webhooks,

1. Log in to Freshdesk and go to **Admin**

2. From the **Helpdesk Productivity** choose the **Automation** option
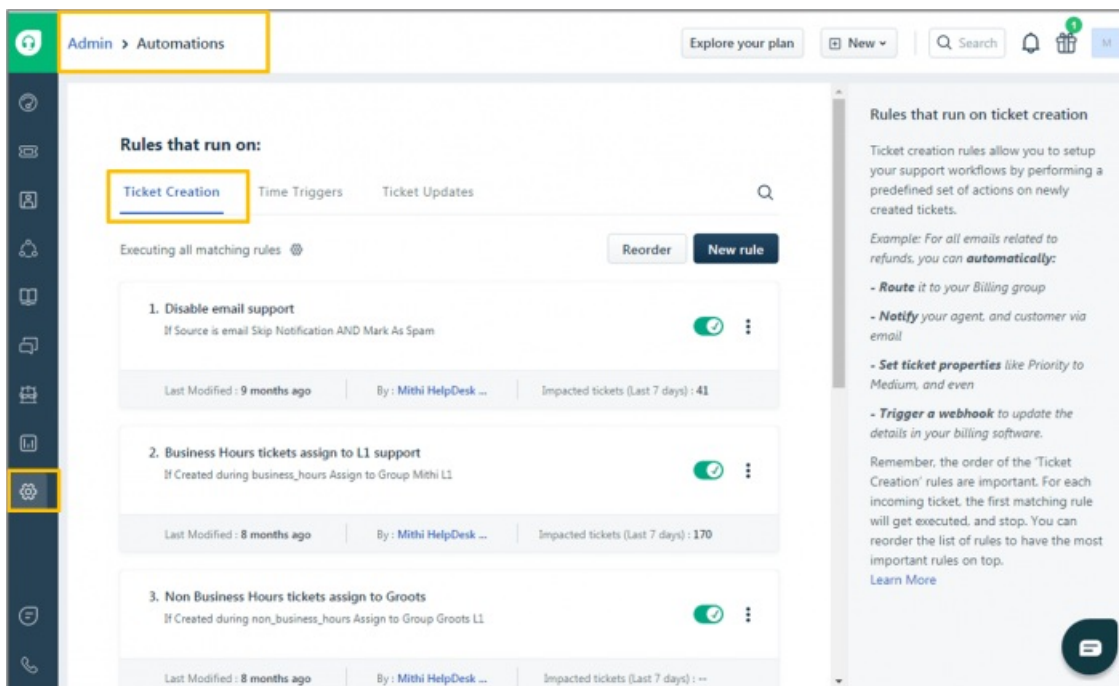
3. Define the following rules.

   a. Add a rule to create a note on Ideolve when a new ticket is created.

   b. Add a rule to add a comment to the note on Ideolve when an agent or the customer posts a reply.

   c. Add a rule to update the note title and the list of Ideolve groups with whom the note is shared when the status of the ticket changes.