**Touchpoint for CRMs Overview**

Integrate Touchpoints into your third-party customer relationship management (CRM) or ticketing system.

The Touchpoint for CRM is a custom collection of Touchpoints designed to provide customer insights to your agents in your CRM and ticketing systems to better answer customer service requests. Implement Touchpoints to integrate your MindTouch content into your third-party customer relationship management (CRM) or ticketing system.

Integrating MindTouch Touchpoints into your CRM or ticketing system provides:

- **Insight into customer behavior.** Support agents gain valuable insight into the user behavior of customers who are submitting tickets.
- **Targeted ticket resolution.** Support agents are better equipped to answer customer questions, provide meaningful direction and close tickets faster.
- **Self-service opportunities.** Customers will be more satisfied with their experience and have opportunities to learn, self-serve and engage.
- **Content quality control.** Content managers gain insight into which documentation is lacking in providing help to customers.

**Agent experience**

A custom Touchpoint integration may look different for every platform, but the following Touchpoints solve for typical CRM and ticketing system use cases.

Not all of functionalities are available out of the box. These recommended integrations can be accomplished with Touchpoints in addition to some development and configuration, resulting in complete integrations such as MindTouch for Zendesk.

The Touchpoint for CRM includes customer insights, search-in-place, and, publishing capabilities.

**Customer insights**

Agents can learn about a ticket submitter's MindTouch view and search history right from inside their ticketing system window.
Search-in-place

Agents can search your MindTouch site from within the ticketing system to find relevant content and link content to a support ticket response.
Publishing

Agents can systematically mark and organize tickets to allow for the creation of new content when necessary.

MindTouch vs. systems integrator responsibility

**MindTouch**

- Provides the Touchpoints code and customer insights token
- Provides the Touchpoints configuration options
- Maintains the Touchpoints code and quality assurance

**Systems integrator**

Provides parameters such as default search terms, customer ID, etc.
- Provides custom behavior, such as what happens when "link to case" is clicked
- Responsible for research of the CRM integration process
• Responsible for understanding the unique platform ecosystem
• Responsible for any needed custom development efforts to integrate Touchpoints into a CRM environment
• Responsible for any testing and quality assurance needs

Common Touchpoints for CRMs

**Sign-in:** Allows users to authenticate from any web property.

**Customer insights:** Shows your user's MindTouch search and viewing history. Requires a customer insights token to pass user data into your ticketing system.

**Search-in-place:** Allows users to search your MindTouch site from any web property.

Prerequisites for creating a Touchpoint

• Admin access to your MindTouch site
• Admin access to your third-party ticketing system or CRM
• Understanding of the ticketing system's integration or development environment.

A developer resource may be needed if you want to customize a Touchpoint beyond out-of-box configuration settings.

Integration points

1. Embed your Touchpoints into your ticketing system interface.
2. Configure your ticketing form to pass through user data via a token.

For your CRM, determine how to implement the MindTouch components at these two points. See [an example of how we accomplished this with Touchpoints for Zendesk](https://success.mindtouch.com/Integrations/CRM/Touchpoint_for_CRMs/01-Touchpoint_for_CRMs_Overview).