Feedback Analytics

Kampyle LTD

Salesforce.com Integration - Installation and Customization Guide

January 2010

This document is an easy guide for the installation and customization of Kampyle's Salesforce.com integration. This guide contains the main screens and will help new Kampyle users start to get feedback, leads and cases.

Contents

www.kampyle.com

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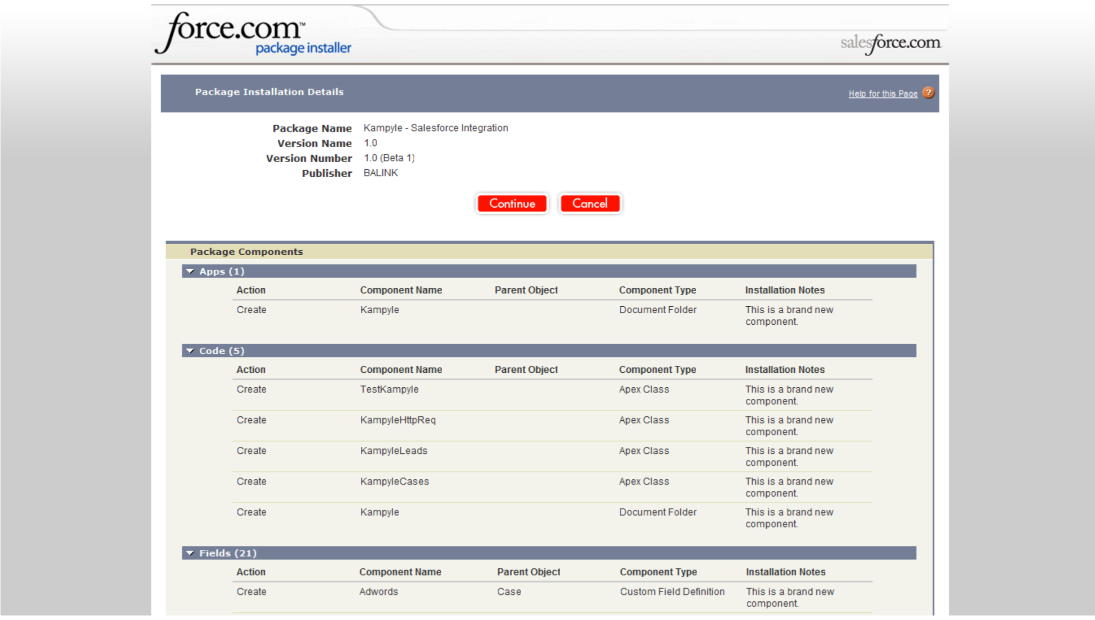
1 Deployment from AppExchange

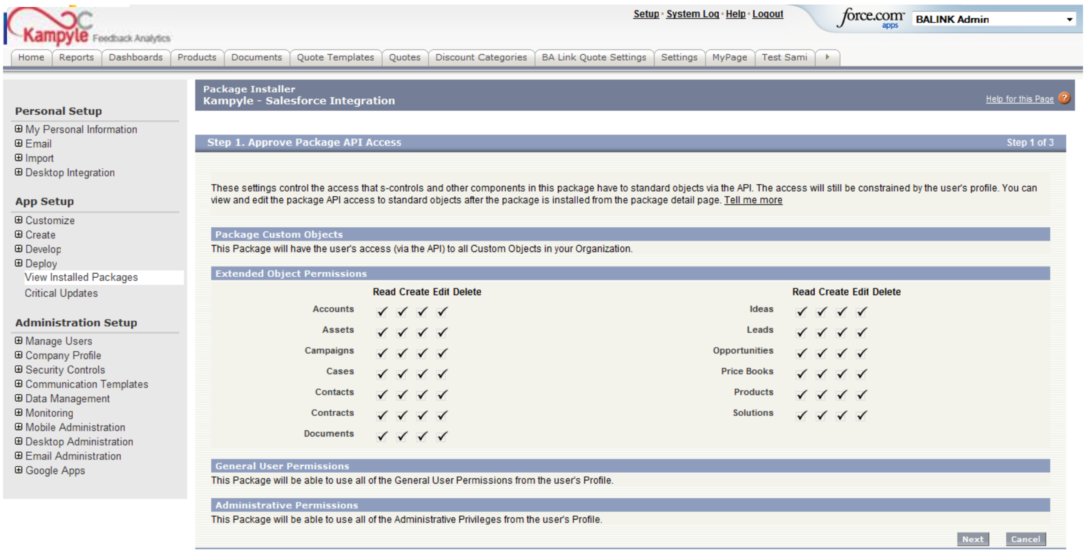
1.1 Package installation page

Press 'Continue' button.



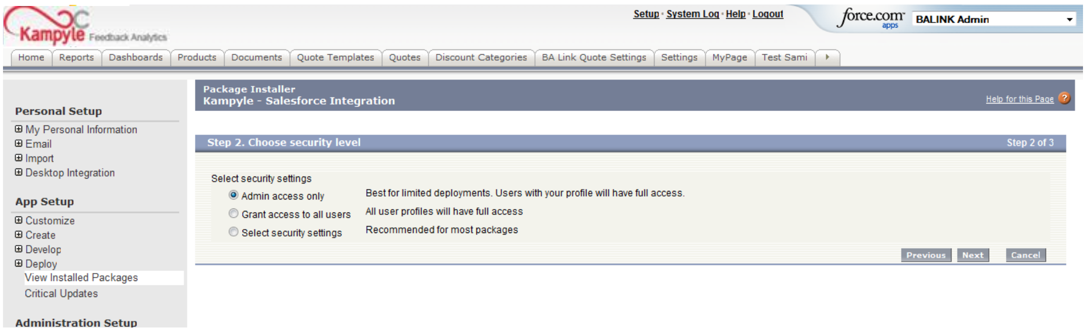
1.2 Step 1 – Approve package API access

Press 'Next' button.



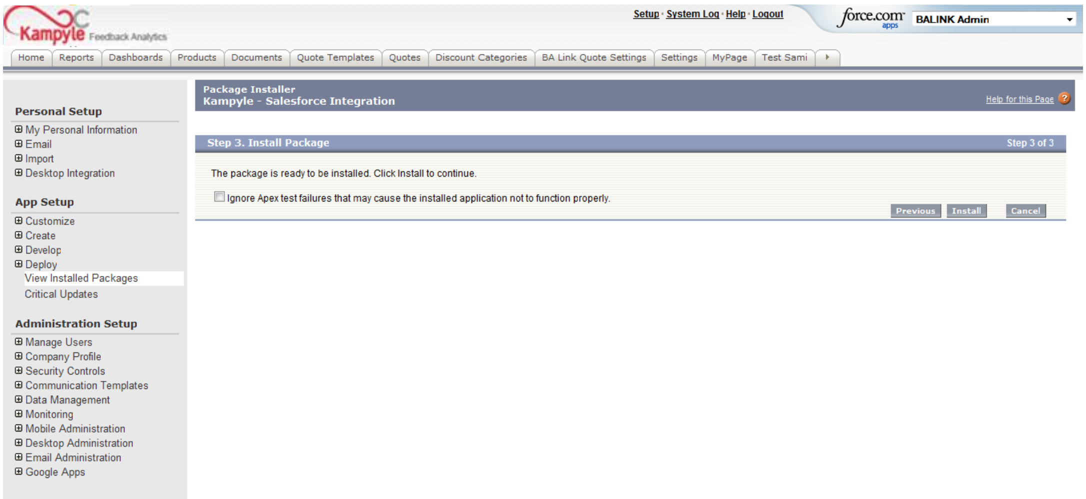
1.3 Step 2 – Choose security level

Press 'Next' button.



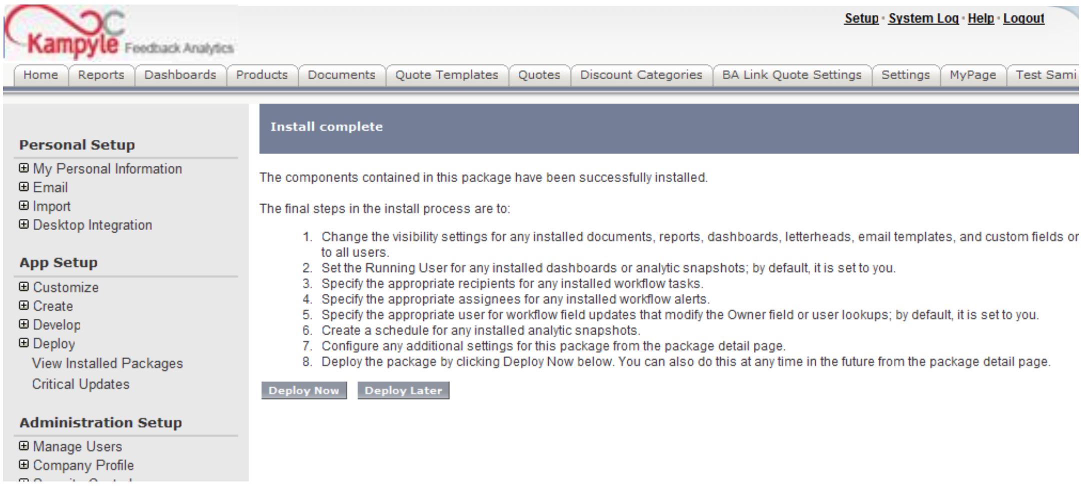
1.4 Step 3 – Install package

Press 'Install' button.



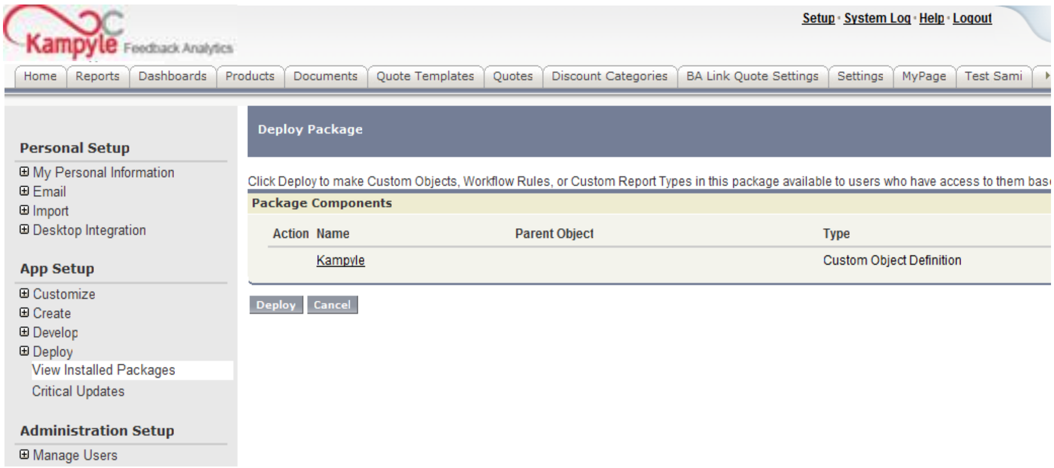
1.5 Install complete

Press 'Deploy Now' button.



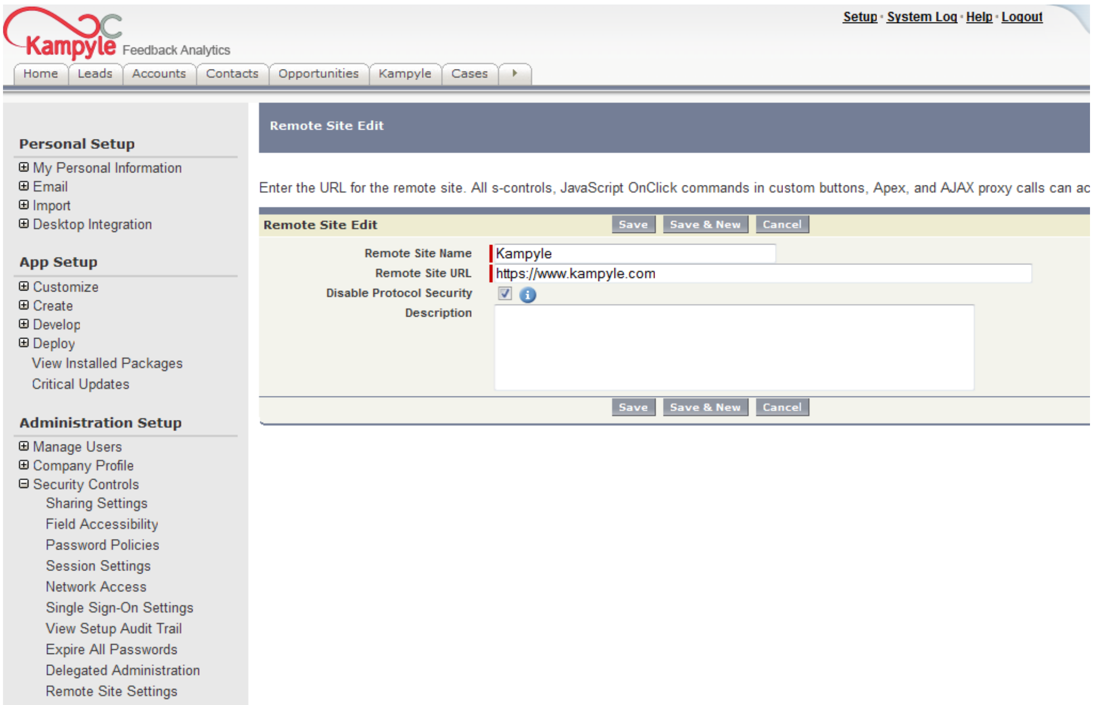
1.6 Deploy package

Press 'Deploy' button.



2 Setting Remote Site

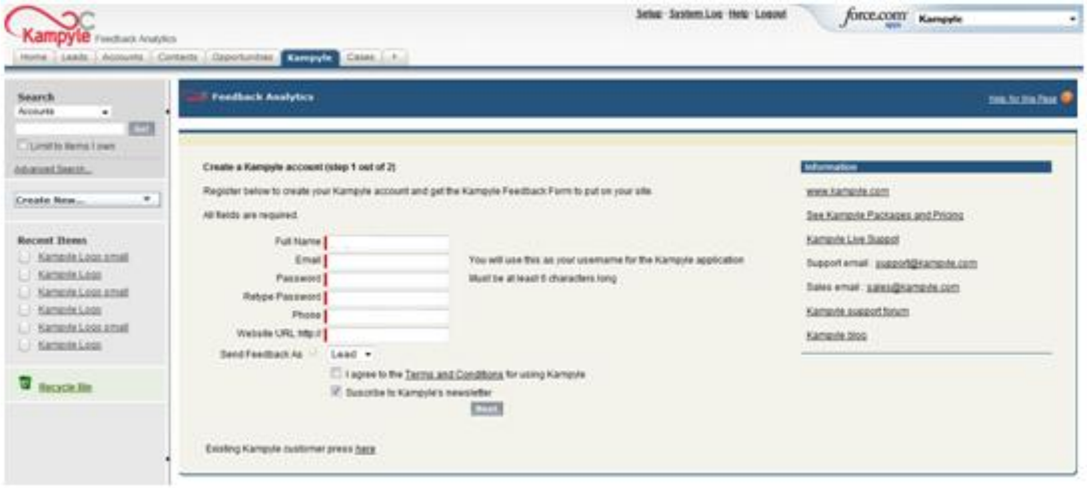
Go to 'Setup' ➔ 'Security Controls' ➔ 'Remote Site Settings' ➔ Press 'New Remote Site' button.
Set:
* Remote Site Name: Kampyle
* Remote Site URL: https://www.kampyle.com
* Check 'Disable Protocol Security.'



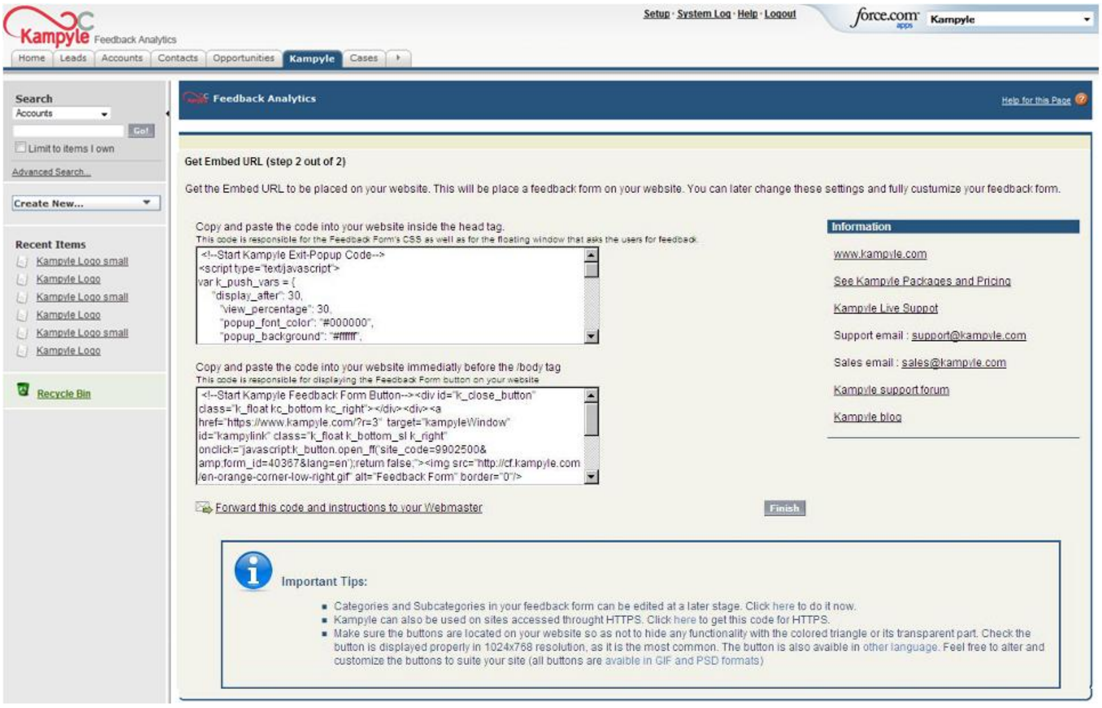
3 Kampyle application

In the top right application window, select Kampyle application.

3.1 Create a new Kampyle account or use your existing account



3.1.1 New Kampyle account users need to implement Kampyle's embed URL on their Web sites:
* Copy and paste the first code into your Web site inside the <head> tag.
* Copy and paste the second code into your Web site immediately before the </body> tag.

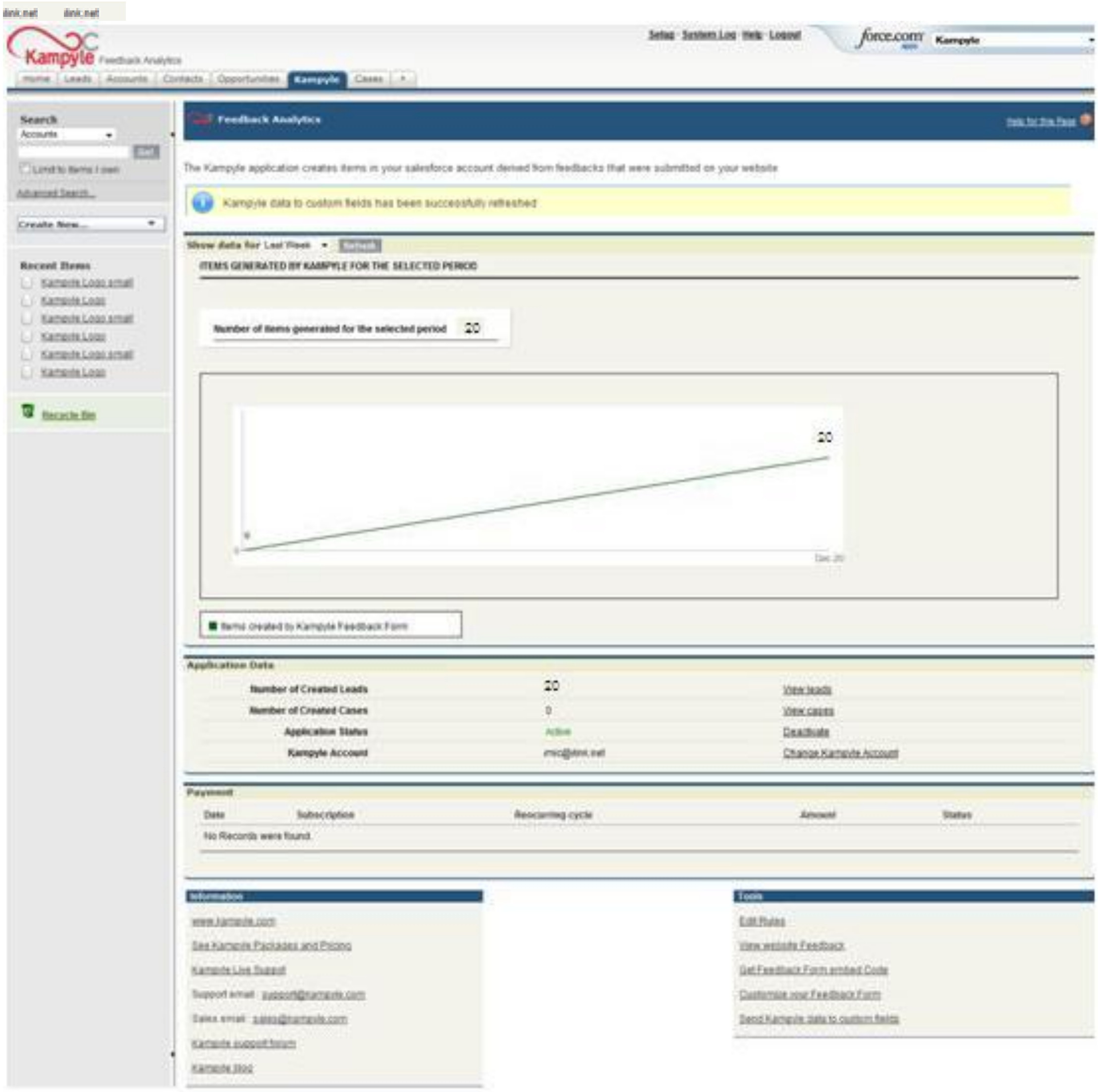



```
<!--Start Kampyle Exit-Popup Code-->
<script type="text/javascript">
var k_push_vars = {
  "display_after": 30,
  "view_percentage": 30,
  "popup_font_color": "#000000",
  "popup_background": "#ffffff",
```

```
<!--Start Kampyle Feedback Form Button--><div id="k_close_button"
class="k_float kc_bottom kc_right"></div><div><a
href="https://www.kampyle.com/?r=3" target="kampyleWindow"
id="kampylink" class="k_float k_bottom_sl k_right"
onclick="javascript:k_button.open_ff('site_code=9902500&
amp;form_id=40367&lang=en');return false;"><img src="http://cf.kampyle.com
/en-orange-corner-low-right.gif" alt="Feedback Form" border="0"/>
```

Get more information about [How do I start using Kampyle?]

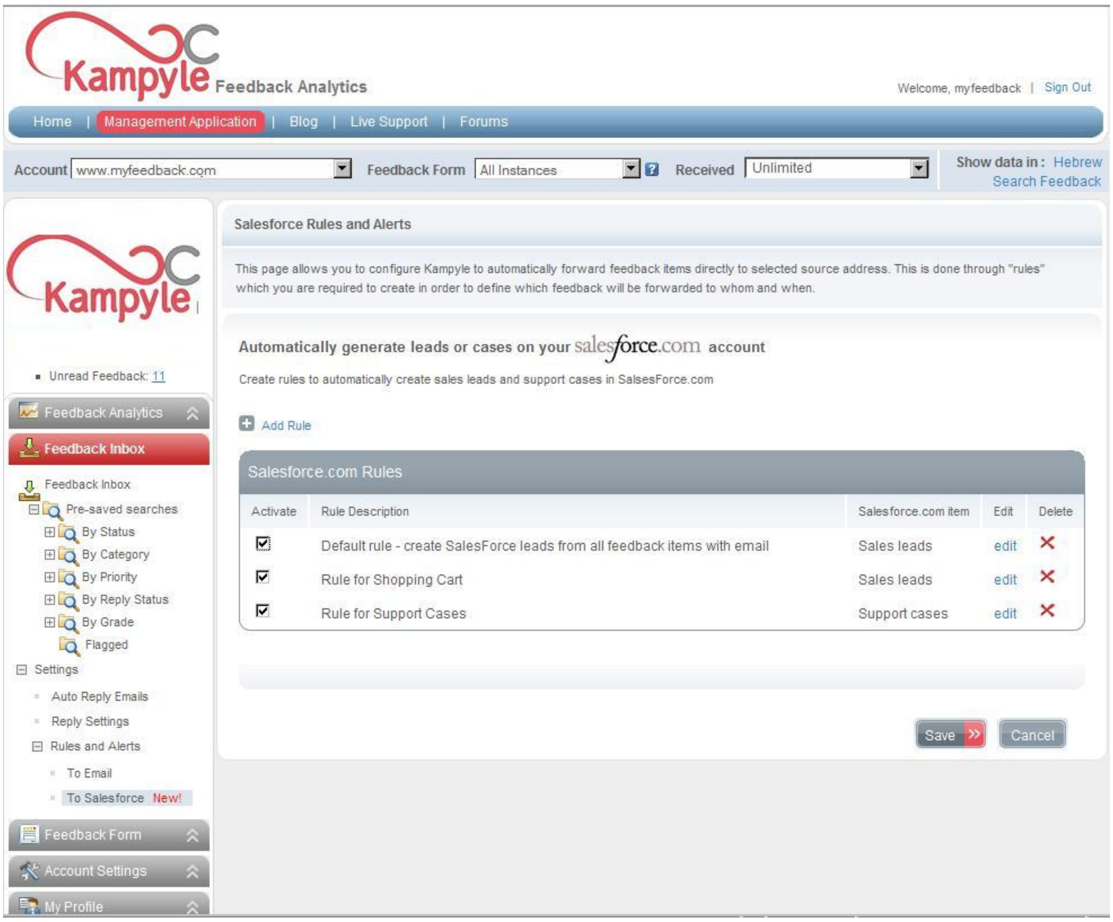
3.2. Start receiving leads and cases from your Web site user's feedback.



4 Customization

4.1 Customizing rules in Kampyle for generating leads or cases

When you register Kampyle through Salesforce, you choose from the drop down list called 'send feedback as' the default rule which sends all feedback items to Salesforce as lead or case. The default rule is set to automatically send only items which include users' e-mail (the e-mail is not a mandatory field in Kampyle feedback form).
You can customize easily the rules to fit your Web site's needs; for example, sent items from specific pages such as your shopping cart process. Please follow the steps below.
Click here to login to Kampyle ➔ 'Feedback Inbox' on the left panel tabs ➔ 'Rules and Alert' ➔ 'To Salesforce' ➔ 'Add rule'

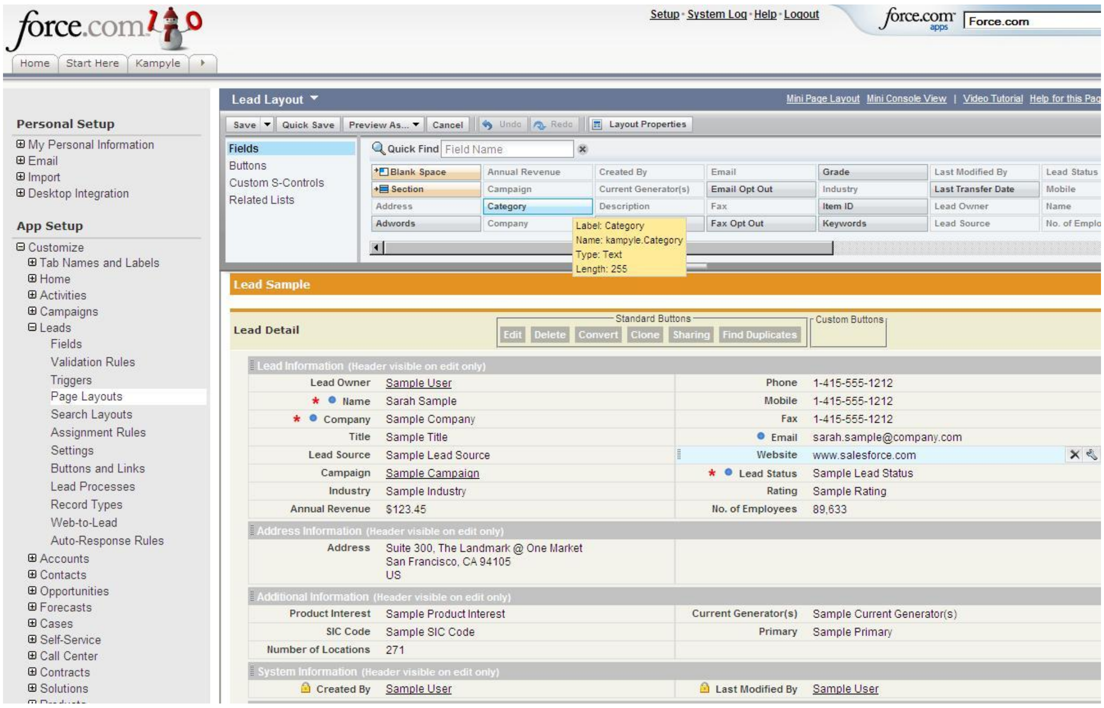


4.2 Customizing leads and cases page layout

All Kampyle's feedback fields will be sent to both lead and case description fields by default. If you wish to create these fields in the lead or case page layout, please follow the steps below.

4.2.1 Customizing leads page layout

Go to 'Setup' ➔ 'Add Setup' ➔ 'Customize' ➔ 'Leads' ➔ 'Page Layouts' ➔ Press 'Edit' next to the 'Lead Layout.'
On that page drag and drop the following Kampyle fields to the locations you wish in the page layout:
*Category
*Grade
*Item ID
*Adwords
*Keywords



4.2.2 Customizing cases page layout

Go to 'Setup' ➔ 'Add Setup' ➔ 'Customize' ➔ 'Cases' ➔ 'Page Layouts' ➔ Press 'Edit' next to the 'Case Layout' and drag all the fields as was done in the leads page layout.

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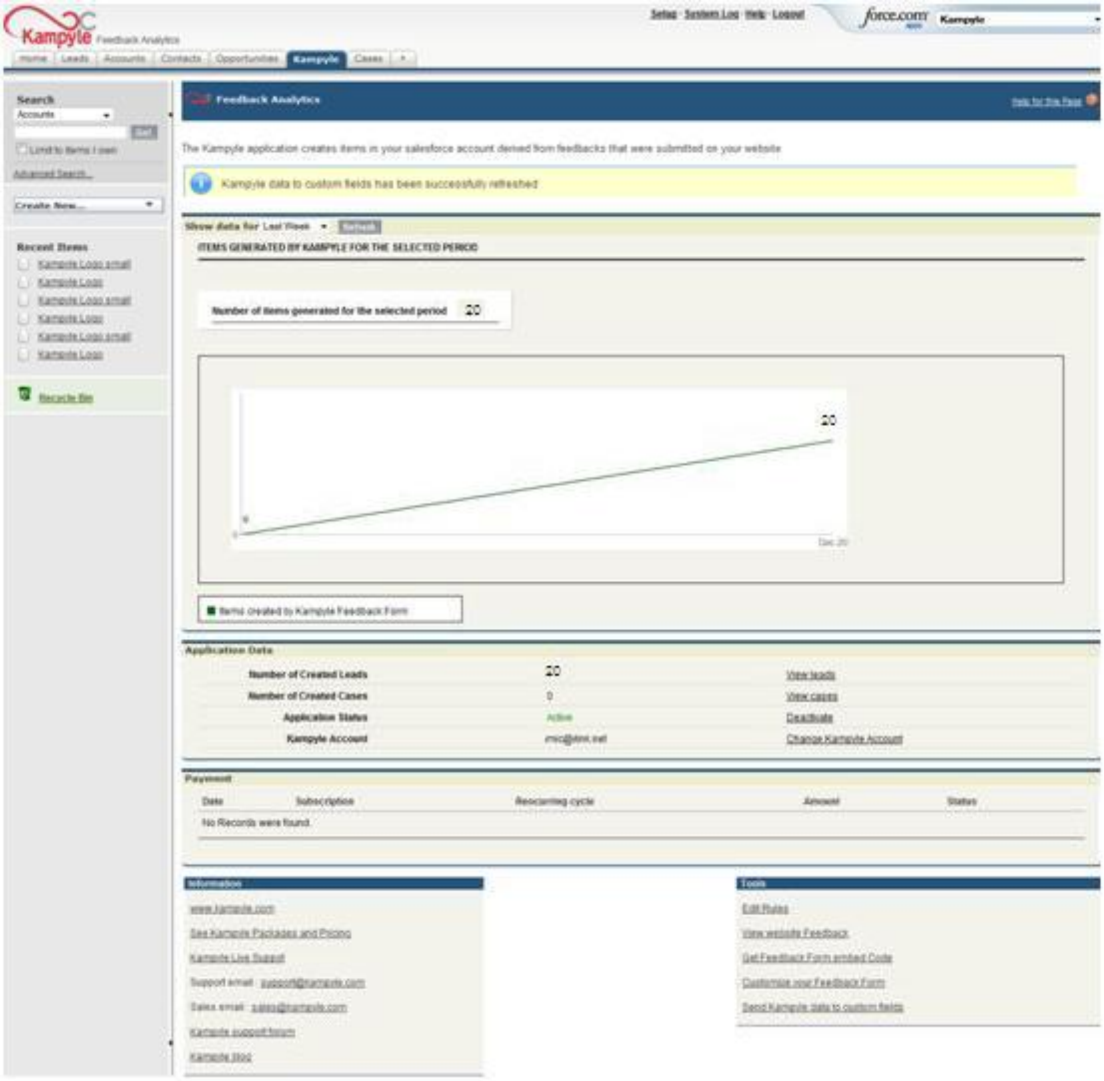
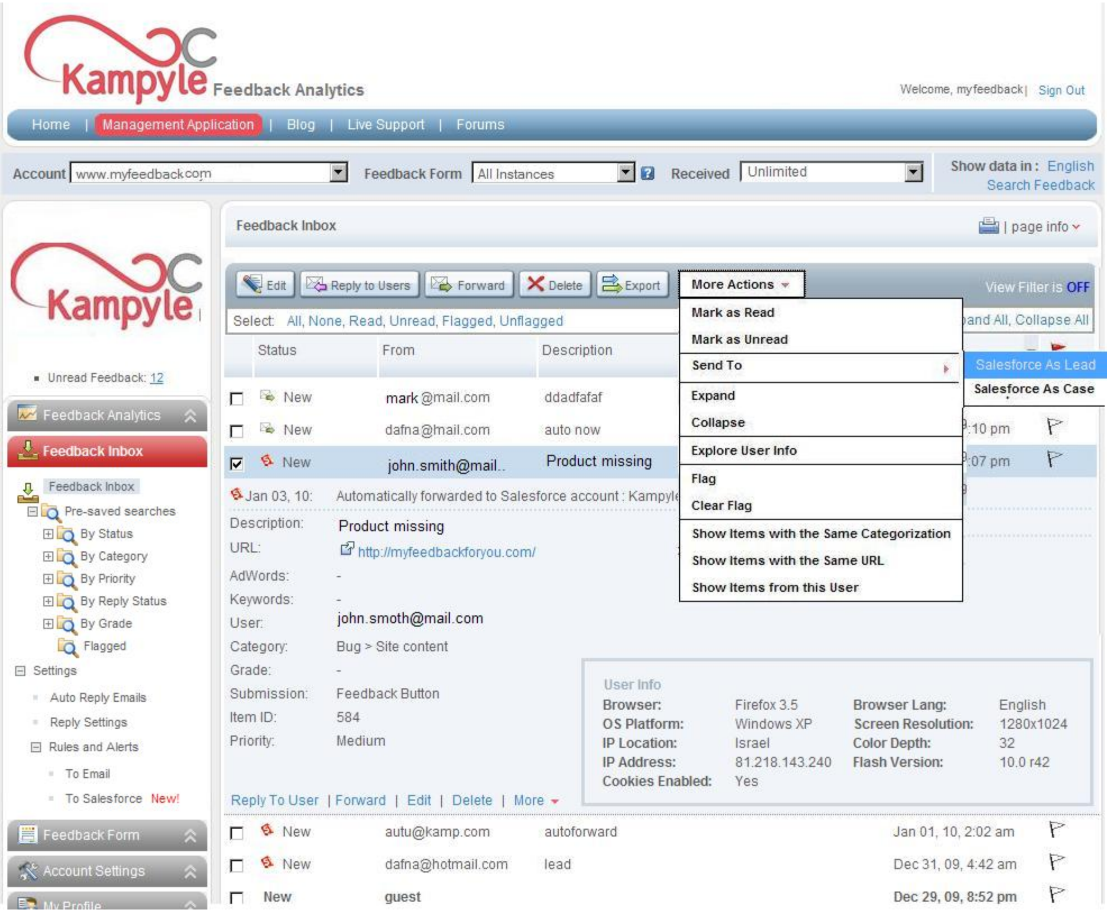
4.2.3 Send Kampyle data to custom fields

Go back to Kampyle tab and press 'Send Kampyle data to custom fields' in the 'Tools' list.



5 Manually sending Kampyle feedback to Salesforce

When you review your feedback Inbox in Kampyle and identify potential leads and/or relevant feedback for your support cases, you can manually send this feedback to Salesforce. Please follow the steps bellow.
Click here to login to Kampyle ➔ 'Feedback Inbox' on the left panel tabs ➔ select one or more items ➔ press 'More Action' button ➔ 'Send To' ➔ 'Salesforce As Lead / Case'.



6 Assigning packages

Kampyle's free package allows you to receive up to five leads or cases per month with the default rule. The option of receiving more leads and cases, customizing rules and manually sending feedback to Salesforce is available in the Silver Package, as well as the Gold and Platinum Kampyle packages. For a complete list of Kampyle packages, click here.

Congratulations!

Kampyle is now configured and ready to use.

If you have any questions, please contact:
sales@kampyle.com
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