



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.

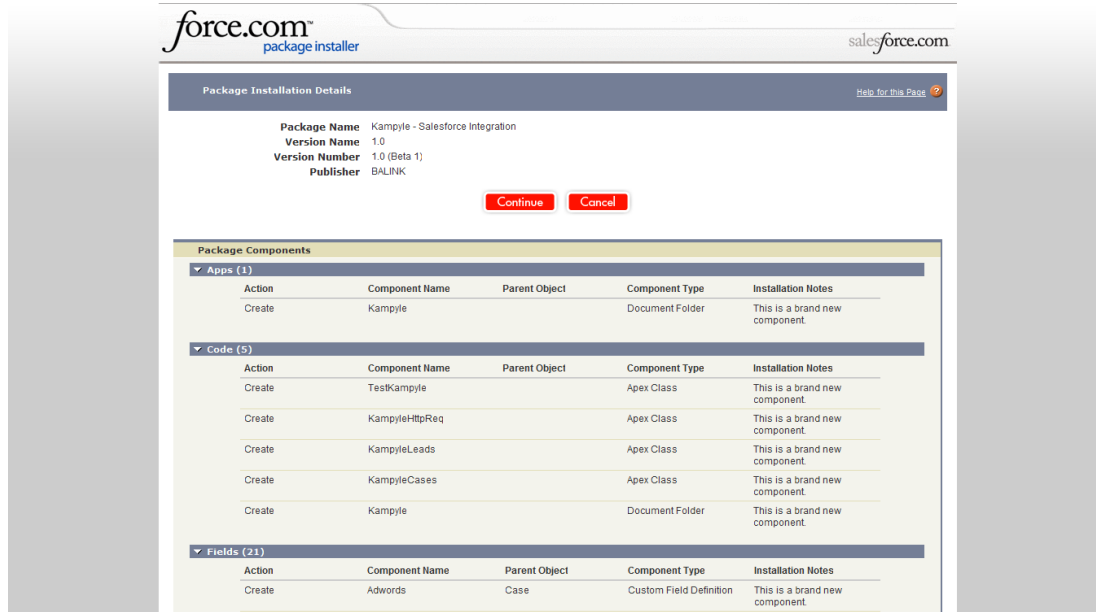
## Contents

1	Deployment from AppExchange .....	3
1.1	Package installation page .....	3
1.2	Step 1 – Approve package API access .....	3
1.3	Step 2 – Choose security level .....	4
1.4	Step 3 – Install package .....	4
1.5	Install complete .....	5
1.6	Deploy package .....	5
2	Setting Remote Site .....	6
3	Kampyle application .....	7
3.1	Create a new Kampyle account or use your existing account .....	7
4	Customization .....	9
4.1	Customizing rules in Kampyle for generating leads or cases .....	9
4.2	Customizing leads and cases page layout .....	9
4.2.1	Customizing leads page layout .....	10
4.2.2	Customizing cases page layout .....	10
4.2.3	Send Kampyle data to custom fields .....	11
5	Manually sending Kampyle feedback to Salesforce .....	12
6	Assigning packages .....	13

# 1 Deployment from AppExchange

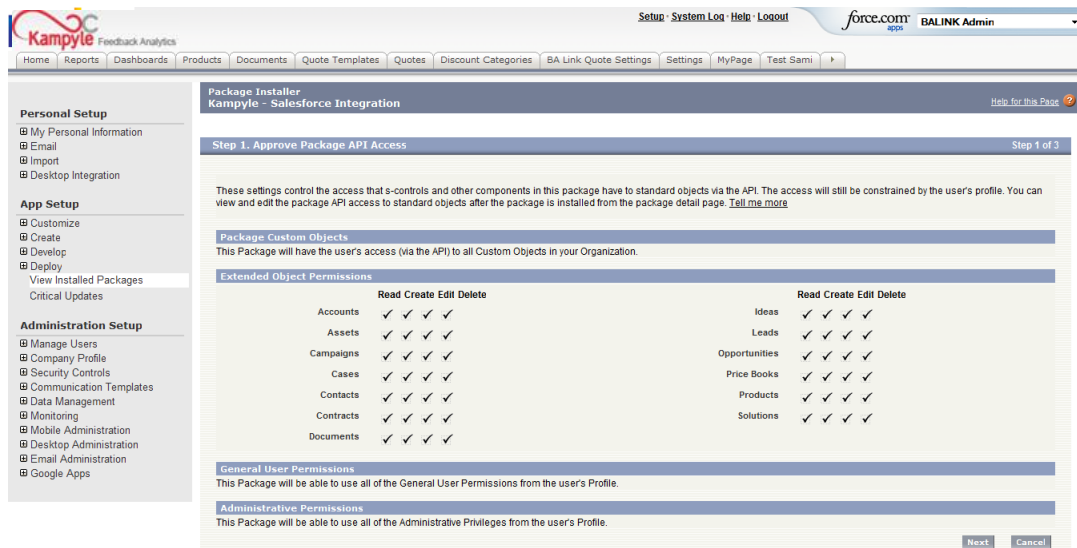
## 1.1 Package [installation page](#)

Press 'Continue' button.



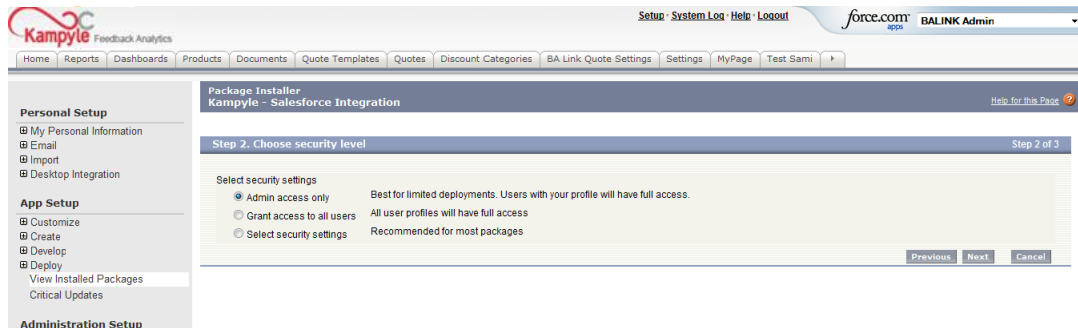
## 1.2 Step 1 – Approve package API access

Press 'Next' button.



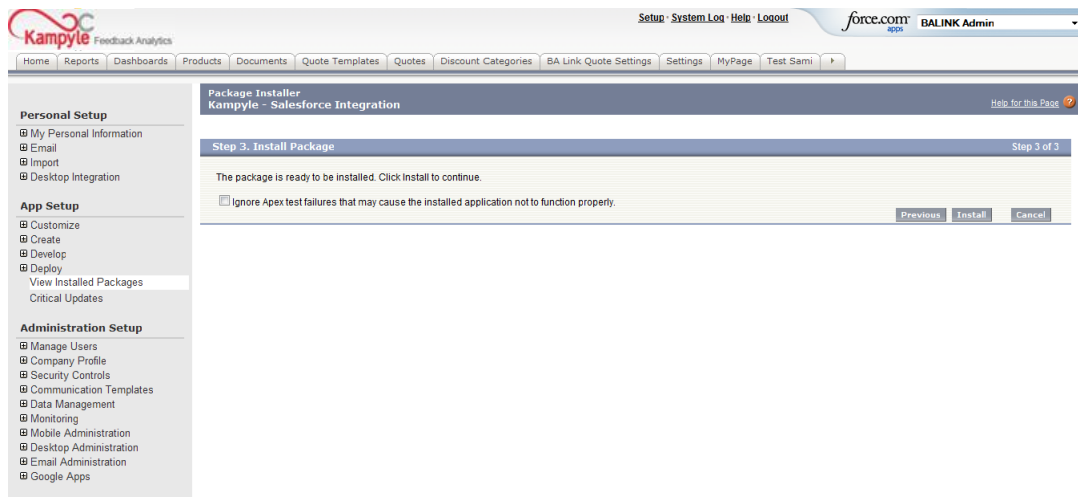
### 1.3 Step 2 – Choose security level

Press 'Next' button.



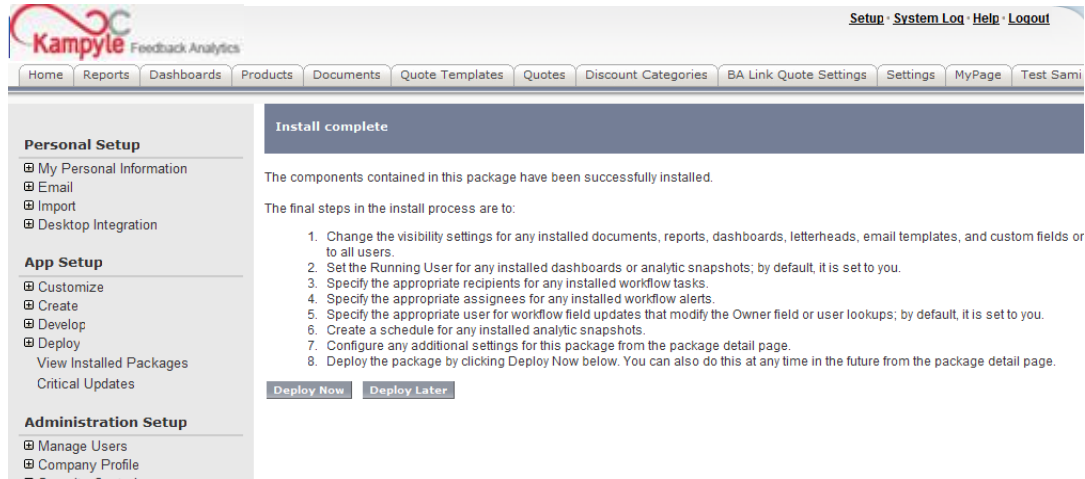
### 1.4 Step 3 – Install package

Press 'Install' button.



## 1.5 Install complete

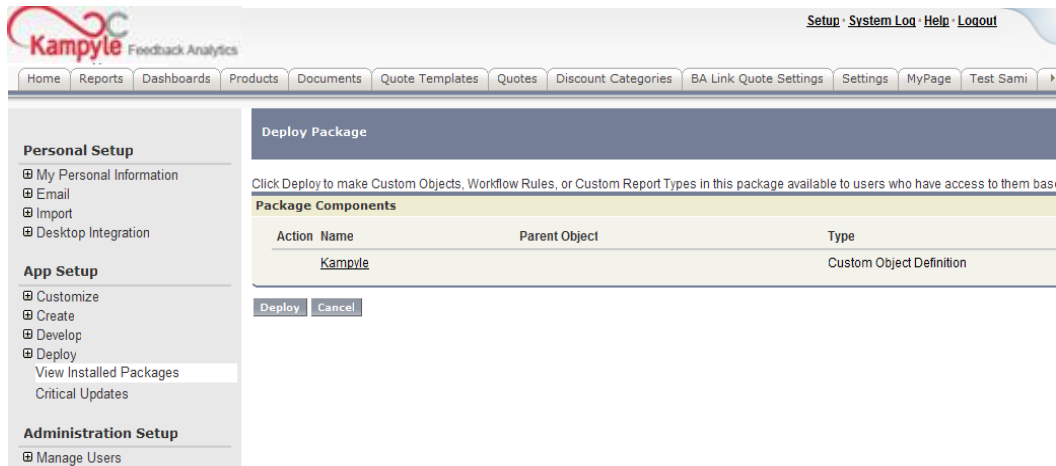
Press 'Deploy Now' button.



The screenshot shows the 'Install complete' page. The left sidebar contains navigation menus for Personal Setup, App Setup, and Administration Setup. The main content area has a dark blue header 'Install complete' and a message: 'The components contained in this package have been successfully installed. The final steps in the install process are to:'. A numbered list of 8 steps follows, detailing configuration tasks like visibility settings, running users, workflow tasks, assignees, workflow alerts, user lookups, analytic snapshots, and additional settings. At the bottom of the list are two buttons: 'Deploy Now' and 'Deploy Later'.

## 1.6 Deploy package

Press 'Deploy' button.



The screenshot shows the 'Deploy Package' page. The left sidebar is the same as in the previous screenshot. The main content area has a dark blue header 'Deploy Package' and a message: 'Click Deploy to make Custom Objects, Workflow Rules, or Custom Report Types in this package available to users who have access to them bas...'. Below this is a table titled 'Package Components' with three columns: Action, Name, Parent Object, and Type. The table contains one row with 'Kampyle' as the Name and 'Custom Object Definition' as the Type. At the bottom of the table are two buttons: 'Deploy' and 'Cancel'.

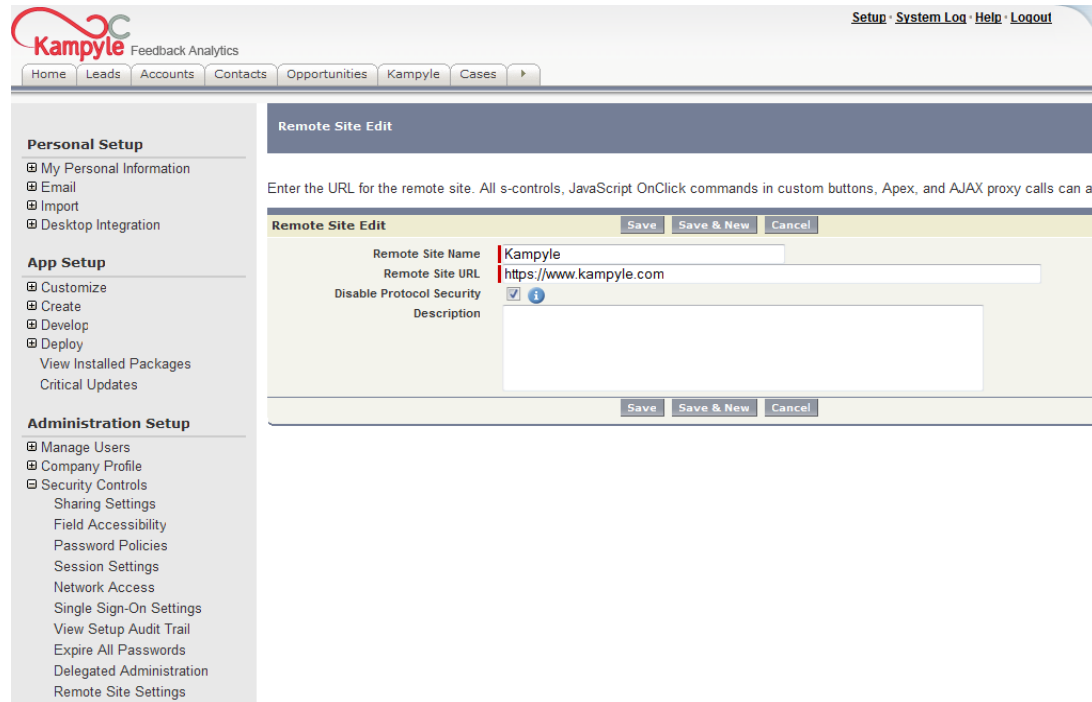
Action	Name	Parent Object	Type
	Kampyle		Custom Object Definition

## 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.'

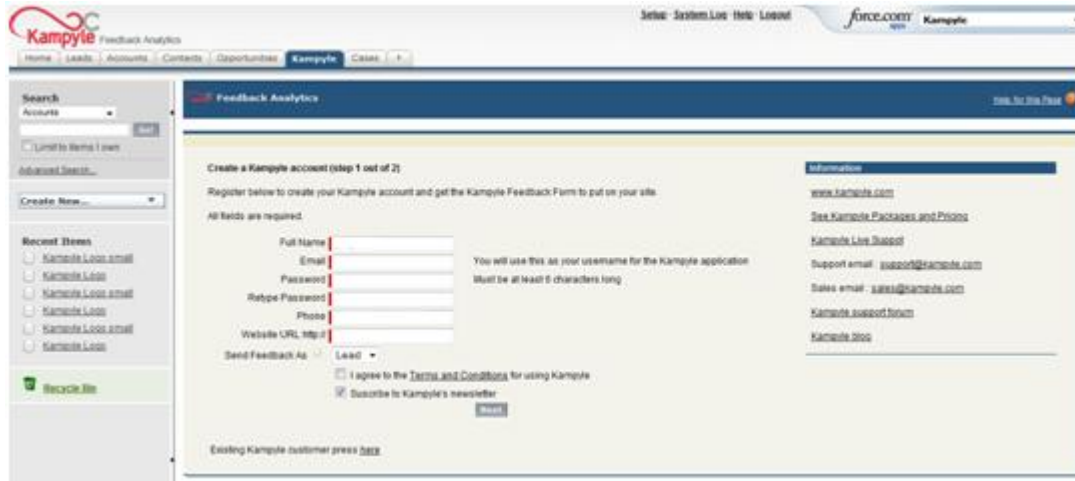


The screenshot shows the 'Remote Site Edit' interface. At the top, there's a navigation bar with 'Home', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Kampyle', and 'Cases'. Below this is a sidebar with three main sections: 'Personal Setup' (My Personal Information, Email, Import, Desktop Integration), 'App Setup' (Customize, Create, Develop, Deploy, View Installed Packages, Critical Updates), and 'Administration Setup' (Manage Users, Company Profile, Security Controls, Sharing Settings, Field Accessibility, Password Policies, Session Settings, Network Access, Single Sign-On Settings, View Setup Audit Trail, Expire All Passwords, Delegated Administration, Remote Site Settings). The main content area is titled 'Remote Site Edit' and contains a text box for the URL with the instruction: 'Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can ac'. Below this is a form with three fields: 'Remote Site Name' (value: Kampyle), 'Remote Site URL' (value: https://www.kampyle.com), and 'Disable Protocol Security' (checkbox checked). There are 'Save', 'Save & New', and 'Cancel' buttons at the bottom of the form.

### 3 Kampyle application

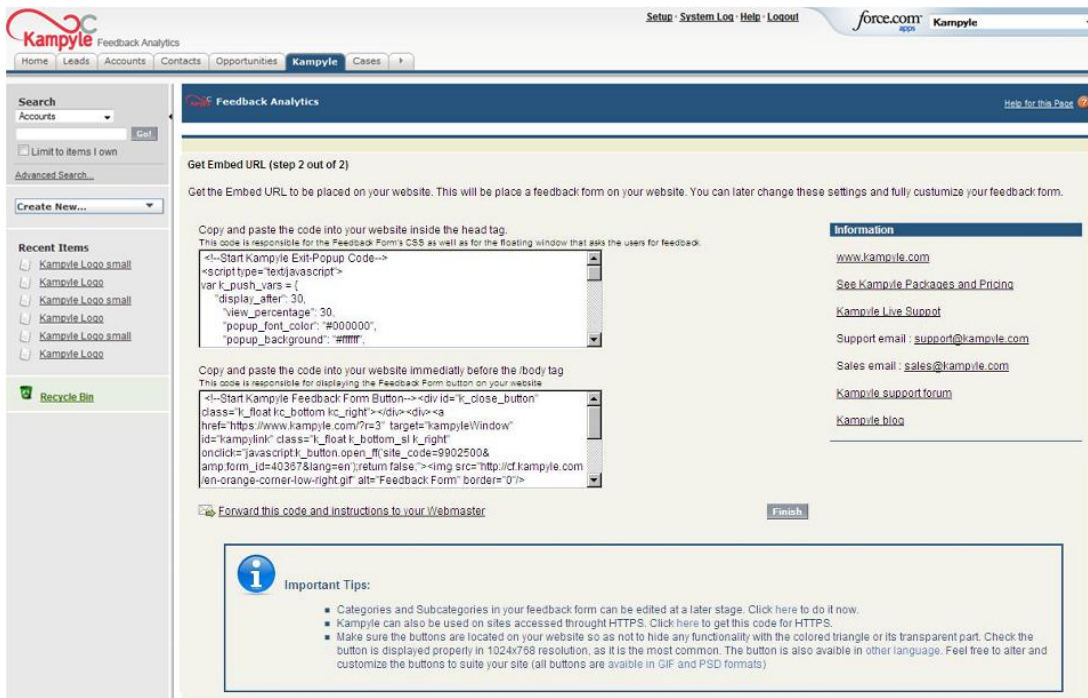
In the top right application window, select Kampyle application.


#### 3.1 Create a new Kampyle account or use your existing account



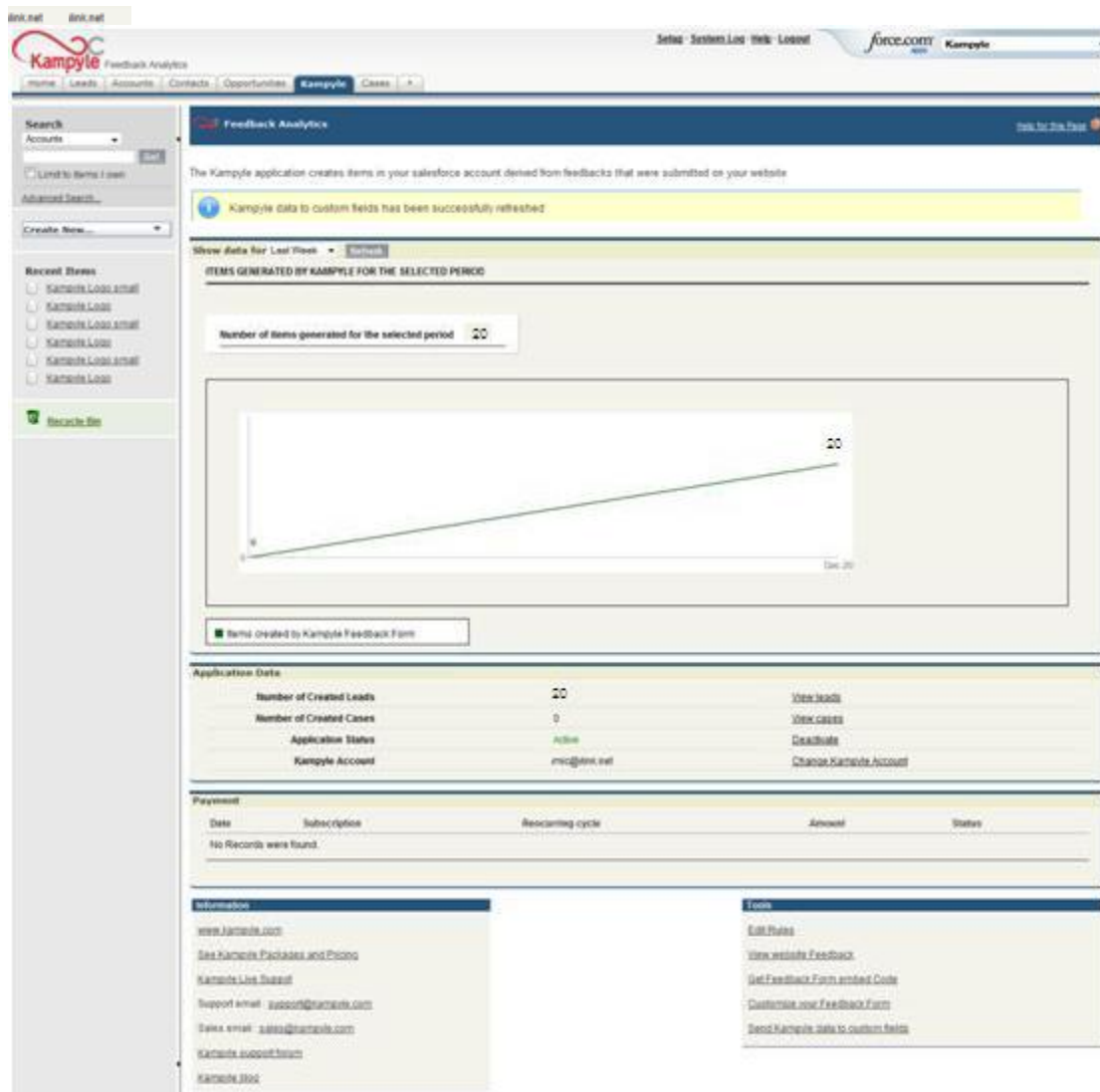
3.1.1 New Kampyle account users need to implement Kampyle's embed URL on their Web sites:

- \* 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.



 Get more information about [How do I start using Kampyle?](http://www.kampyle.com)

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



The screenshot displays the Kampyle Feedback Analytics interface within a Salesforce account. The top navigation bar includes 'Home', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Kampyle', and 'Cases'. The main content area features a search bar and a 'Feedback Analytics' section with a notification: 'Kampyle data to custom fields has been successfully refreshed'. Below this, a chart shows 'ITEMS GENERATED BY KAMPYLE FOR THE SELECTED PERIOD' with a line graph indicating 20 items generated. A table below the chart provides application details:

Application Data			
Number of Created Leads	20		<a href="#">View leads</a>
Number of Created Cases	0		<a href="#">View cases</a>
Application Status	Active		<a href="#">Deactivate</a>
Kampyle Account	inc@inc.net		<a href="#">Change Kampyle Account</a>

Below the application data is a 'Payment' section with a table that currently shows 'No Records were found'. At the bottom, there are two sections: 'Information' and 'Tools'. The 'Information' section includes links for 'www.kampyle.com', 'See Kampyle Packages and Pricing', 'Kampyle Live Support', 'Support email: support@kampyle.com', 'Sales email: sales@kampyle.com', 'Kampyle support form', and 'KAMPYLE.HOT'. The 'Tools' section includes links for 'Edit Status', 'View website Feedback', 'Get Feedback Form embed Code', 'Customize your Feedback Form', and 'Send Kampyle data to custom fields'.

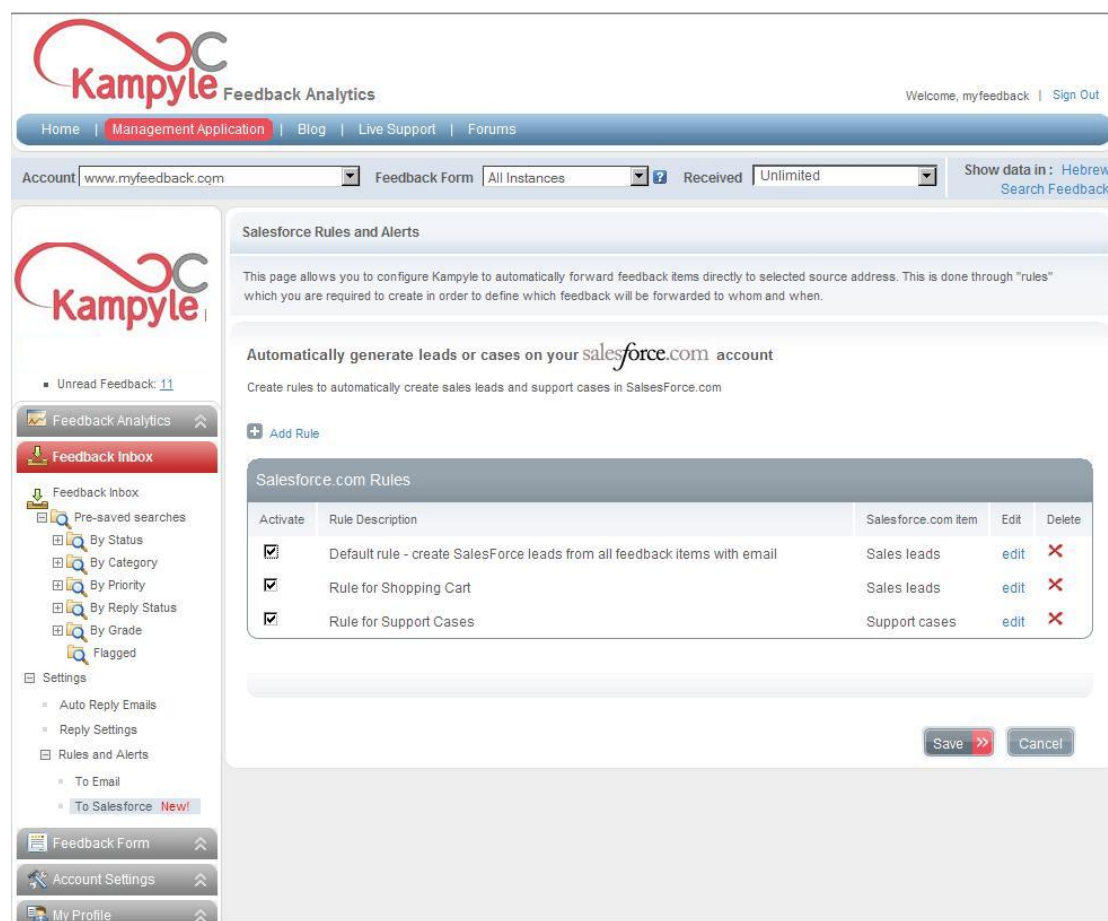
## 4 Customization

### 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'



**Salesforce Rules and Alerts**

This page allows you to configure Kampyle to automatically forward feedback items directly to selected source address. This is done through "rules" which you are required to create in order to define which feedback will be forwarded to whom and when.

**Automatically generate leads or cases on your salesforce.com account**

Create rules to automatically create sales leads and support cases in SalsesForce.com

[+ Add Rule](#)

Activate	Rule Description	Salesforce.com item	Edit	Delete
<input checked="" type="checkbox"/>	Default rule - create SalesForce leads from all feedback items with email	Sales leads	edit	×
<input checked="" type="checkbox"/>	Rule for Shopping Cart	Sales leads	edit	×
<input checked="" type="checkbox"/>	Rule for Support Cases	Support cases	edit	×

[Save](#) [Cancel](#)

### 4.2 Customizing leads and cases page layout

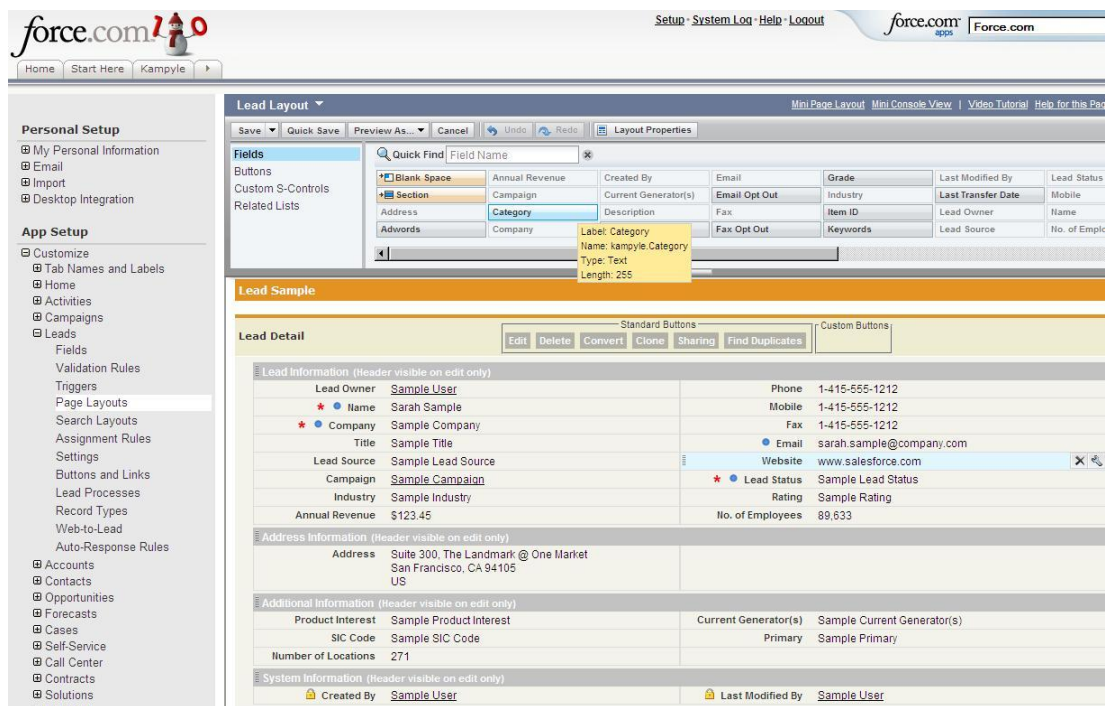
All Kampyle's feedback fields will be sent to both lead and case description fields by default. If you wish to create these fields in the lead or case page layout, please follow the steps below.

#### 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

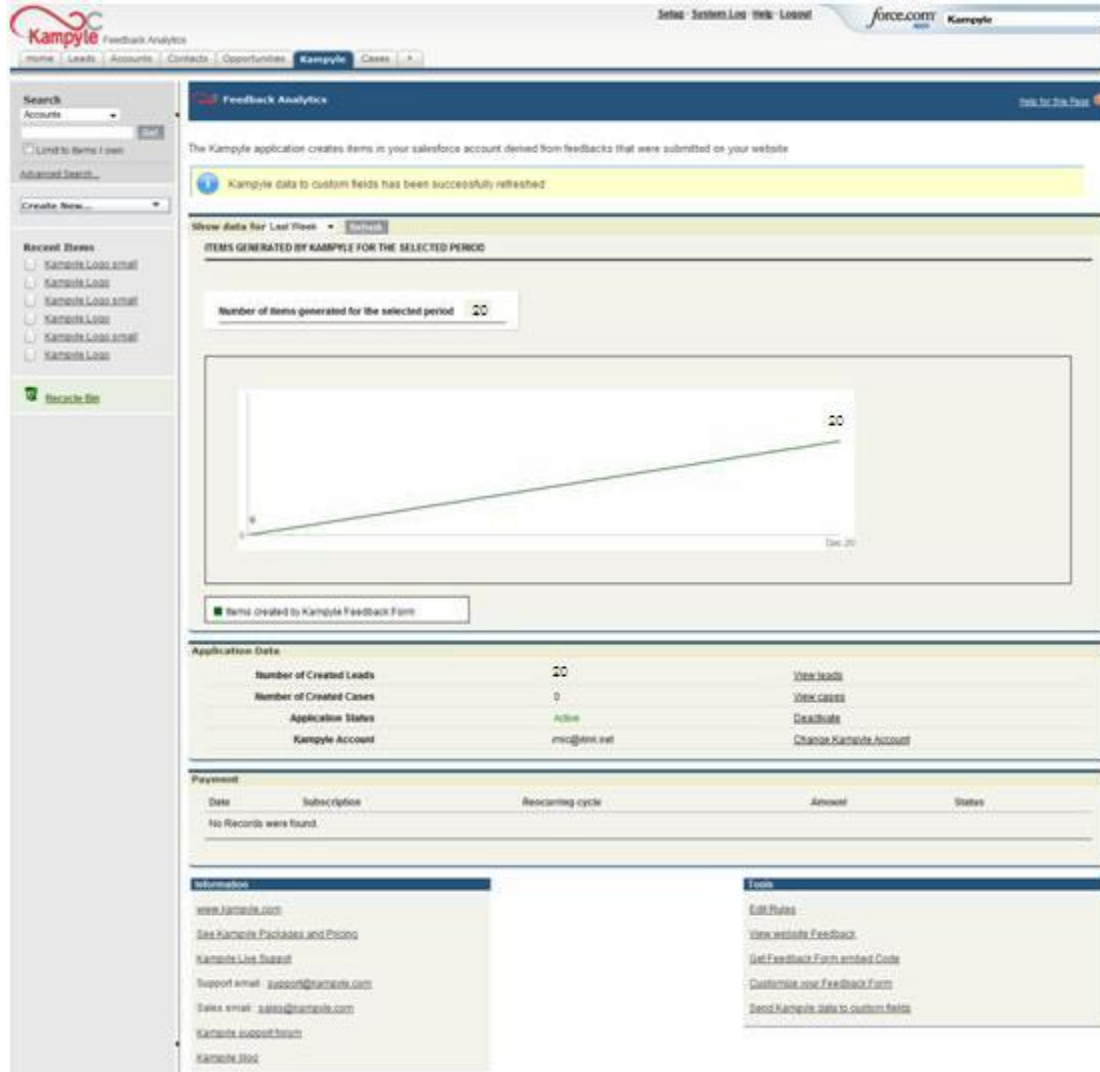


#### 4.2.2 Customizing cases page layout

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.

### 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.



The screenshot shows the Kampyle Feedback Analytics interface within a Salesforce environment. A notification banner at the top states: "Kampyle data to custom fields has been successfully refreshed". Below this, a section titled "ITEMS GENERATED BY KAMPYLE FOR THE SELECTED PERIOD" displays a line graph showing a steady increase in items over time, with a final value of 20. A table below the graph provides application details:

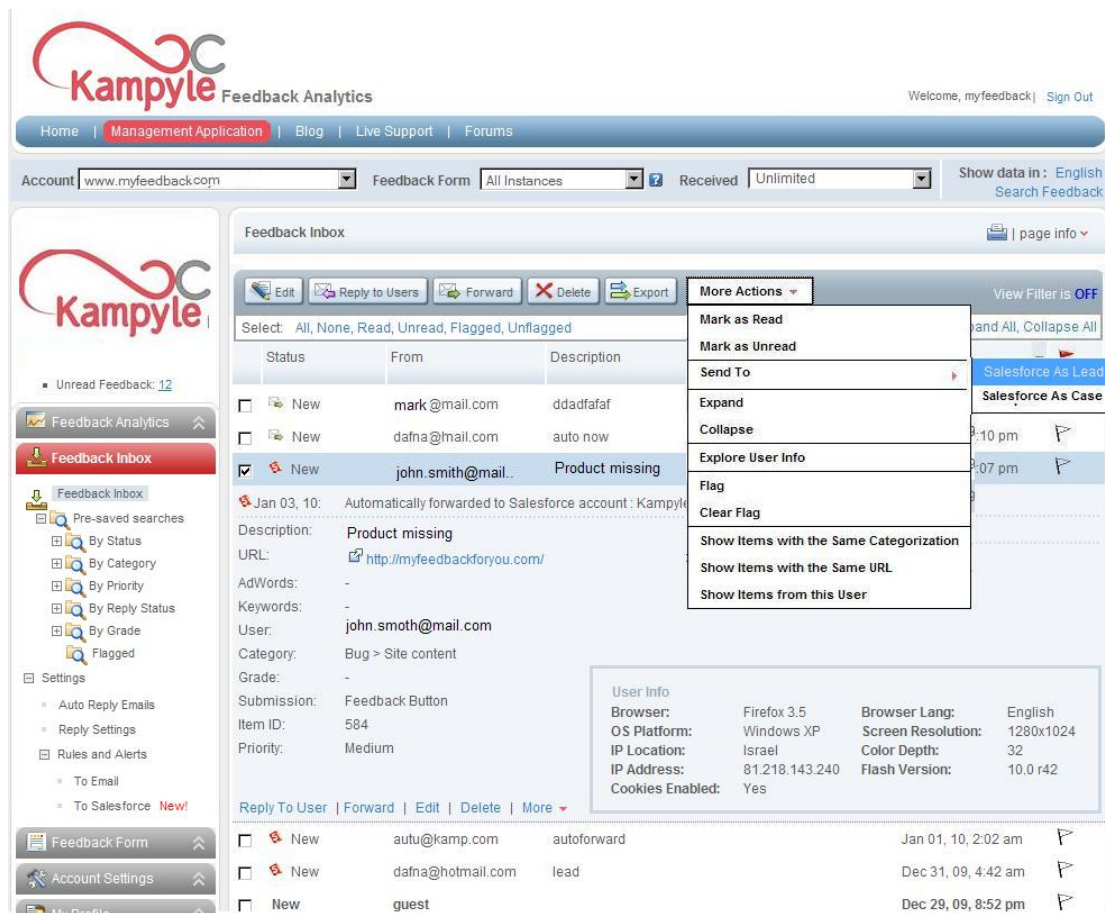
Application Data			
Number of Created Leads	20	View leads	
Number of Created Cases	0	View cases	
Application Status	Active	Deactivate	
Kampyle Account	enc@enc.net	Change Kampyle Account	

Below the application data, a "Payment" section indicates "No Records were found". At the bottom, there are two panels: "Information" with contact details for Kampyle (website, support email, sales email, support form, and phone number) and "Tools" with options to edit status, view website feedback, get feedback form embed code, customize the feedback form, and send Kampyle data to custom fields.

## 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 below.

[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'.



The screenshot displays the Kampyle Feedback Analytics web application. The main content area shows the 'Feedback Inbox' with a table of feedback items. One item is selected, and a 'More Actions' dropdown menu is open, showing the 'Send To' option highlighted. The 'Send To' option is further expanded to show 'Salesforce As Lead' and 'Salesforce As Case' as available destinations.

Status	From	Description
<input type="checkbox"/> New	mark@mail.com	ddadfafaf
<input type="checkbox"/> New	dafna@mail.com	auto now
<input checked="" type="checkbox"/> New	john.smith@mail..	Product missing
<p>Jan 03, 10: Automatically forwarded to Salesforce account : Kampyle</p> <p>Description: Product missing</p> <p>URL: <a href="http://myfeedbackforyou.com/">http://myfeedbackforyou.com/</a></p> <p>AdWords: -</p> <p>Keywords: -</p> <p>User: john.smith@mail.com</p> <p>Category: Bug &gt; Site content</p> <p>Grade: -</p> <p>Submission: Feedback Button</p> <p>Item ID: 584</p> <p>Priority: Medium</p>		

User Info			
Browser:	Firefox 3.5	Browser Lang:	English
OS Platform:	Windows XP	Screen Resolution:	1280x1024
IP Location:	Israel	Color Depth:	32
IP Address:	81.218.143.240	Flash Version:	10.0 r42
Cookies Enabled:	Yes		

## 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](mailto:sales@kampyle.com)  
(646)452-9480