

# Kayako connect

Connect Salesforce with Kayako

## **USER MANUAL**

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# KayakoConnect User Manual

## App Overview:

**KayakoConnect** is a Salesforce Application. This app is useful to connect Salesforce with Kayako and Kayako with Salesforce. It supports point and click graphical user interface which is very easy and simple to use.

The app is providing bi-directional Sync functionality i.e. Salesforce to Kayako and Kayako to Salesforce. It provides a wide variety of functionality for connecting Salesforce to Kayako and vice versa.





User can perform the following operations: **“Create case”**, **“Update case”**, **“View case(s) Reply”**, **“Create Reply”** and **“Get Attachment”** for any Contact record(s) of Salesforce using this app.

## Features:

1. Creating Case from Salesforce in Kayako.
2. Updating Case from Salesforce in Kayko.
3. Create Reply from Salesforce in Kayako.
4. View Case Replies from Kayako in Salesforce for a specific Case.
5. View All Cases of the user from Kayako in Salesforce.
6. Agent can view Kayako case(s) in Salesforce based on Case Access given to the Agent.

## KayakoConnect APP Homepage

[Home](#) [Contacts](#) [Cases](#) [KayakoConnect](#) +



**- Connect Salesforce with Kayako**

KayakoConnect is a Salesforce Application. This app is useful to connect Salesforce with Kayako and Kayako with Salesforce. It supports point and click graphical user interface which is very easy and simple to use.

This app is providing two way Sync functionality i.e. Salesforce to Kayako and Kayako to Salesforce. It provides a wide variety of functionality for connecting Salesforce to Kayako and Kayako to Salesforce.

User can perform the following operation like **Create Case** , **Update Case** , **View Case(s) Reply** , **Create Reply** for any Contact record(s) of Salesforce using this app.

**Required Settings**

1. Goto **Setup > in Administer > Security Controls > Remote Site Settings** and add Kayako URL (eg :- <https://domainname.Kayako.com>)
2. Before creating OR fetching tickets from Kayako, Please ensure that there should be valid email id on contact.

## 1. CONFIGURATION SETTINGS

### i) ADMIN SETTINGS

Since this app uses the Kayako URL so admin needs to add Kayako Base URL in **Remote Site Settings**. Follow the below steps to add Remote Site Settings.

Steps:

1. Goto **Setup** > in **Administer** > **Security Controls** > **Remote Site Settings**.
2. Add Kayako URL (eg :- <https://domainname.kayako.com>).

Sample :-

### Remote Site Details

« Back to List: Remote Site Settings

Your Kayako Domain for e.g :- <https://astrea.kayako.com>

| Remote Site Detail        |   | Edit | Delete | Clone |  | Modified By | Sunil Sharma, 9/7/2016 4:53 AM |
|---------------------------|---|------|--------|-------|--|-------------|--------------------------------|
| Remote Site Name          | KayakoEndpoint  |      |        |       |  |             |                                |
| Remote Site URL           | <a href="https://astrea.kayako.com">https://astrea.kayako.com</a> |      |        |       |  |             |                                |
| Disable Protocol Security | <input type="checkbox"/>  |      |        |       |  |             |                                |
| Description               |   |      |        |       |  |             |                                |
| Active                    | <input checked="" type="checkbox"/>                               |      |        |       |  |             |                                |
| Created By                | Sunil Sharma, 9/7/2016 4:53 AM                                    | Edit | Delete | Clone |  |             |                                |

## **ii) END USER SETTINGS**

User needs to create a contact in Salesforce, and ensure that email provided to the contact record is a valid email and that email (used as Username for Kayako Login) is provided at creation time of Kayako account and this email id will be used for authentication with Kayako Account.

## **2. KAYAKO CONNECT APP FUNCTIONALITY**

### **Steps to be followed and Navigation Screenshots**

i) First user needs to create the contact in Salesforce, and ensure that email provided to the contact record is a valid email and that email is provided at creation time of Kayako account and this email id will be used for authentication with Kayako Account.

The data displayed in the app will be dependent on the users access level in Kayako.

Home **Contacts** Cases Kayako Credentials +

Create New... Contact Edit **New Contact** Help for this Page

Contacts not associated with accounts are private and cannot be viewed by other users or included in reports.

**Contact Edit** Save Save & New Cancel

**Contact Information** Required Information

Contact Owner Sunil Sharma

First Name --None-- Last Name Birthdate Account Name Title Department Reports To Lead Source --None-- Requested Id

Phone Home Phone Mobile Other Phone Fax Email Assistant Asst. Phone

**Address Information** Copy Mailing Address to Other Address

Mailing Street Mailing City Mailing State/Province Mailing Zip/Postal Code Mailing Country Other Street Other City Other State/Province Other Zip/Postal Code Other Country

**Additional Information**

Languages Level --None--

After Creating Contact Go to Contact Details and add **“Connect with Kayako”** custom button and **“Requested Id”** custom field as well to the layout.

Company Profile Security Controls Domain Management Communication Templates Translation Workbench Data Management Mobile Administration Desktop Administration Lightning for Outlook Lightning Sync Email Administration Google Apps Data.com Administration

**Build**

- Customize
  - Tab Names and Labels
  - Home
  - Activities
  - Campaigns
  - Leads
  - Accounts
  - D&B Companies
  - Contacts
    - Fields
    - Related Lookup Filters
    - Validation Rules
    - Triggers
    - Page Layouts
    - Field Sets
    - Compact Layouts
    - Search Layouts
    - Buttons, Links, and Actions
    - Record Types
    - Limits
- Notes
- Opportunities

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

Quick Find: Field Name

Section Blank Space Account Name Assistant Birthdate Clean Status Contact Owner Data.com Key Department Description Email Email Opt Out Fax Last Stay-in-Touch... Last Stay-in-Touch... Languages Lead Source Level Mailing Address Mobile Name Other Address Other Phone Other State/Province Other Zip/Postal Code Other Country Report Request

**Contact Detail**

Standard Buttons: Edit Delete Clone Change Owner Sharing Request Update Send an Email Check Clean Status

Custom Buttons: **Connect with Kayako**

**Contact Information** (Header visible on edit only)

Contact Owner Sample User

Name Sarah Sample

Account Name Sample Account

Title Sample Title

Department Sample Department

Birthdate 9/9/2016

Reports To Sample Contact

Lead Source Sample Lead Source

**Requested Id** Sample Requested Id

Phone 1-415-555-1212

Home Phone 1-415-555-1212

Mobile 1-415-555-1212

Other Phone 1-415-555-1212

Fax 1-415-555-1212

Email sarah.sample@company.com

Assistant Sample Assistant

Asst. Phone 1-415-555-1212

**Address Information** (Header visible on edit only)

Mailing Address Suite 300, The Landmark @ One Market San Francisco, CA 94105 US

Other Address Suite 300, The Landmark @ One Market San Francisco, CA 94105 US

**Additional Information** (Header visible on edit only)

Languages Sample Languages

Level Sample Level

**System Information** (Header visible on edit only)

Created By Sample User

Last Modified By Sample User

**Description Information** (Header visible on edit only)

Description Sample Description

**Custom Links** (Header visible on detail only)

ii) Click “Connect with Kayako” button to perform intended operation in Kayako.

The screenshot shows the Salesforce interface for a contact named Sunil Sharma. The left sidebar contains a 'Recent Items' list with several entries, including 'Sunil Sharma' and various IDs. The main content area displays the 'Contact Detail' for Sunil Sharma, with fields for Name, Account Name, Title, Department, Birthdate, Reports To, Lead Source, Requested Id, Mailing Address, Languages, Created By, and Description. A blue box highlights the 'Connect with Kayako' button in the top right corner of the contact detail section. A blue arrow points to this button with the text 'Click on "Connect with Kayako" button'. Below the contact detail, there are sections for 'Cases' and 'Kayako Credentials', both showing 'No records to display'. The bottom of the page features a navigation bar with 'Home', 'Contacts', 'Cases', and 'Kayako Credentials' tabs.

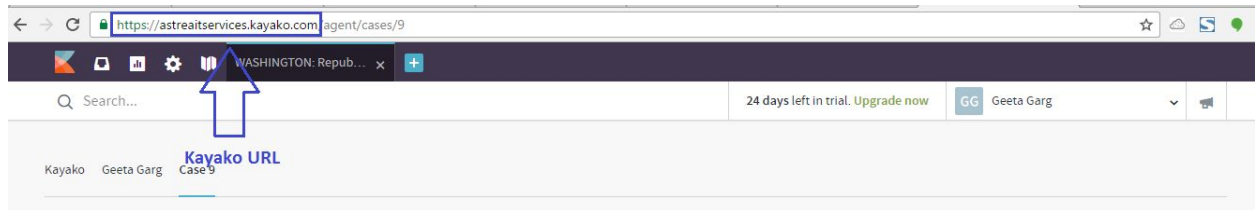
This screenshot shows the top portion of the Salesforce interface. It includes the Salesforce logo, a search bar with the text 'Search...', and a navigation bar with tabs for 'Home', 'Contacts', 'Cases', and 'Kayako Credentials'. The 'Contacts' tab is currently selected.

UserName

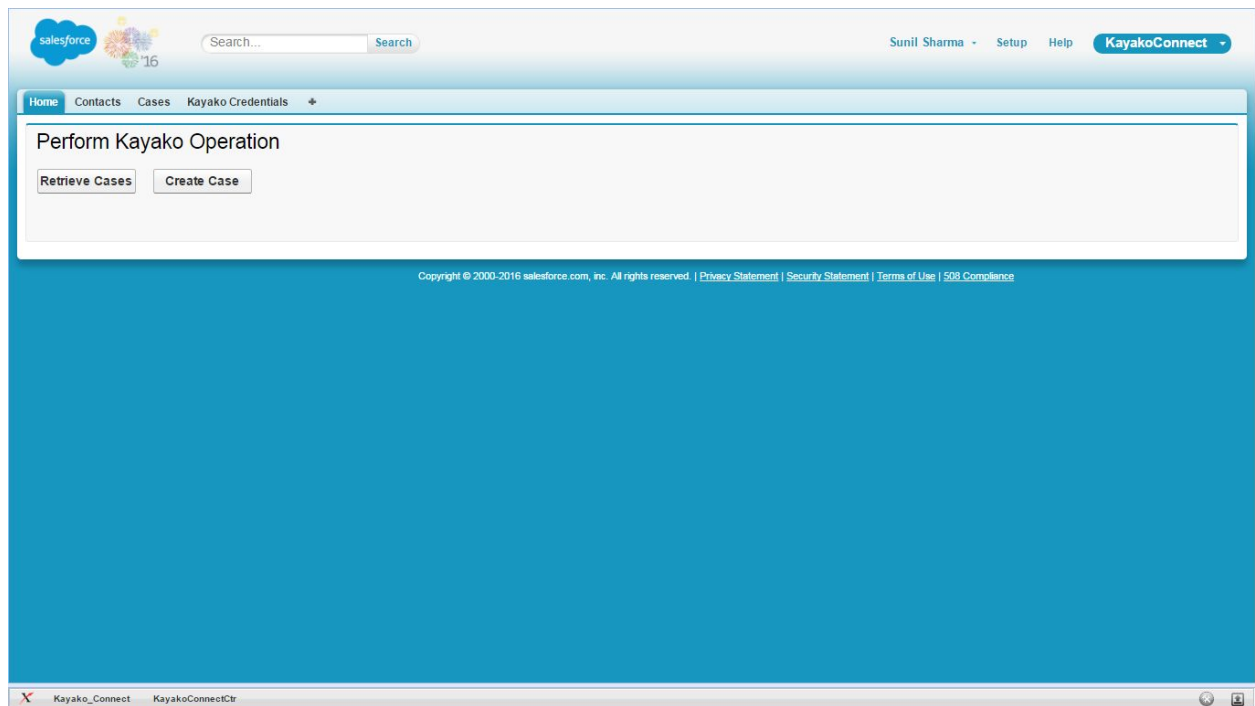
Kayako URL

Password

To find your Kayako URL, please refer to Screenshot below:



If Kayako URL and Password is valid then both value will be saved in custom object "**Kayako Credentials**" and will be redirect to the "Kayako Connect" page otherwise it will show error message.

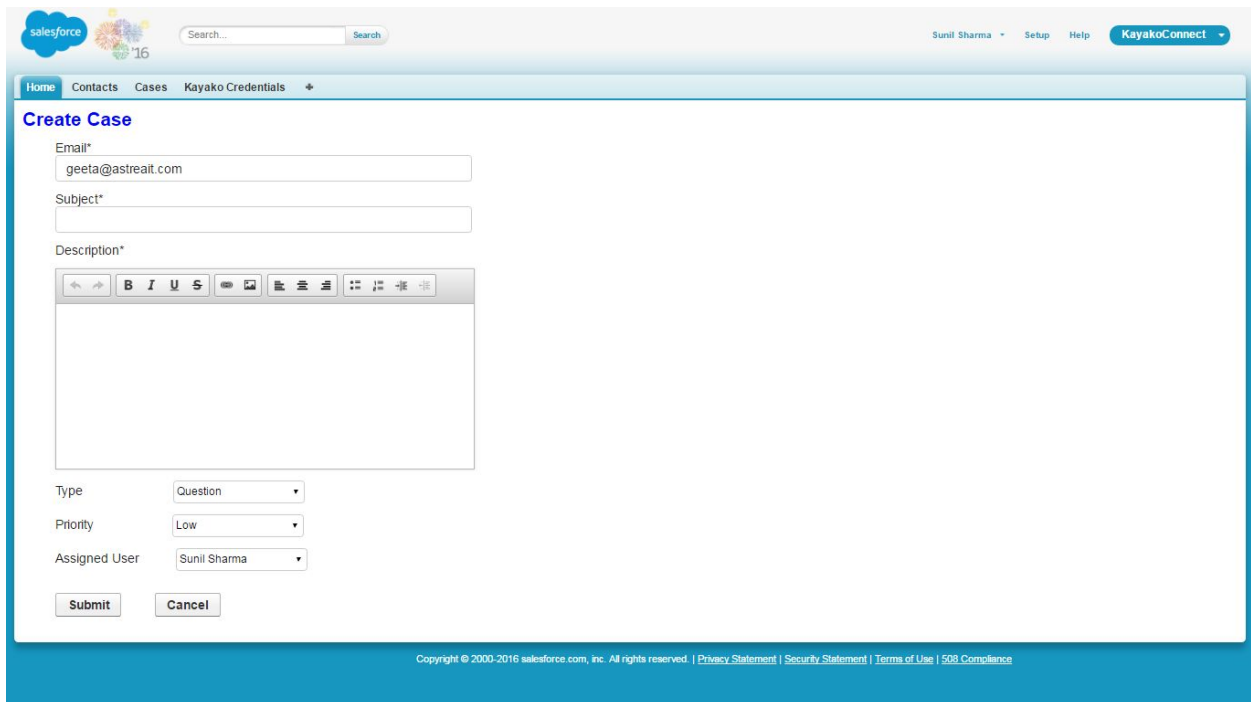


iii) To create a new case, click on "**Create Case**" button.



After filling all the required details click on “**Submit**” button. A new Case will be created into Kayako account with the given information.

If case is successfully created in Kayako account, the application will redirect to Kayako Connect page otherwise the error message returned by Kayako will be displayed on the error page.



The screenshot shows the Salesforce 'Create Case' form. The header includes the Salesforce logo, a search bar, and user information (Sunil Sharma, Setup, Help, KayakoConnect). The navigation bar shows 'Home', 'Contacts', 'Cases', and 'Kayako Credentials'. The form title is 'Create Case'. It contains the following fields:

- Email\***: A text input field containing 'geeta@astreatit.com'.
- Subject\***: An empty text input field.
- Description\***: A rich text editor with a toolbar (undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, decrease indent, increase indent) and a large text area.
- Type**: A dropdown menu with 'Question' selected.
- Priority**: A dropdown menu with 'Low' selected.
- Assigned User**: A dropdown menu with 'Sunil Sharma' selected.
- Buttons**: 'Submit' and 'Cancel' buttons at the bottom left.

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iv) To view all the cases, Click on “**Retrieve Cases**” button. A list of all Kayako Cases will display on the page related to contact user.

The screenshot displays the Salesforce Kayako Connect interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and user information (Sunil Sharma, Setup, Help, KayakoConnect). Below this is a sub-navigation bar with links to Home, Contacts, Cases, and Kayako Credentials. The main content area is titled "Perform Kayako Operation" and contains two buttons: "Retrieve Cases" (which is highlighted) and "Create Case". Below these buttons is a table titled "Cases Related to Contact :". The table has columns for ID, Subject, Resource URL, Priority, Status, Type, Created date, and Action. There are five rows of case data. Each row has a "Get Reply", "Create Reply", "Edit Case", and "Get Attachment" button in the Action column. At the bottom of the table, there are pagination controls (First, Prev, Next, Last) and a status "Viewing 1 of 3 page". The footer contains copyright information for 2000-2016 Salesforce.com, Inc.

| ID | Subject                    | Resource URL         | Priority | Status | Type     | Created date              | Action  |
|----|----------------------------|----------------------|----------|--------|----------|---------------------------|---|
| 15 | Testing 12 September 123   | <a href="#">Link</a> | Low      | Open   | Question | 2016-09-12T05:11:46+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 14 | HTML Content Testing ###02 | <a href="#">Link</a> | Low      | New    | Question | 2016-09-09T12:48:50+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 13 | HTML Content Testing ###01 | <a href="#">Link</a> | Low      | New    | Question | 2016-09-09T12:45:08+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 12 | HTML Content Testing       | <a href="#">Link</a> | High     | New    | Problem  | 2016-09-09T12:41:29+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 11 | demo Testing               | <a href="#">Link</a> | Low      | New    | Question | 2016-09-09T09:40:14+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |

v) To edit the case, Click on “**Edit Case**” button and edit the details with new values then click on “**Submit**” button. Case will be updated into Kayako account directly from Salesforce.

If case is successfully updated in Kayako account, the user will be redirected to Kayako Connect page otherwise it will show error message on the current page.

salesforce 16 Search... Search

Sunil Sharma Setup Help KayakoConnect

Home Contacts Cases Kayako Credentials

### Update Case

User Name

Subject\*

Testing 12 September 123

Type Question

Priority Low

Status Open

Submit Cancel

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vi) To create the reply on case, click on “**Create Reply**” button. After filling all the details, User will click on “**Submit**” button.

If case reply is successfully created in Kayako account, the user will be redirected to Kayako Connect page otherwise it will show error message on the current page.

salesforce 16 Search... Search

Sunil Sharma Setup Help KayakoConnect

Home Contacts Cases Kayako Credentials

### Create Reply

Email\*  
geeta@astreatit.com

Description\*

Type Question

Priority Low

Assigned User Sunil Sharma

Submit Cancel

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vii) For getting the reply, Click on “**Get Reply**” button. The complete details of the Case will be displayed on the pop up window of the page.

salesforce 16 Search... Search

Sunil Sharma Setup Help KayakoConnect

Home Contacts Cases Kayako Credentials

### Perform Kayako Operation

Retrieve Cases Create Case

| ID | Subject                               | Resource URL         | Priority | Action  |
|----|---------------------------------------|----------------------|----------|---|
| 8  | Testing1234                           | <a href="#">Link</a> | Low      | Get Reply Create Reply Edit Case Get Attachment |
| 6  | Demo Testing                          | <a href="#">Link</a> | Low      | Get Reply Create Reply Edit Case Get Attachment |
| 5  | Final Testing ####1                   | <a href="#">Link</a> | Normal   | Get Reply Create Reply Edit Case Get Attachment |
| 4  | Updated My First Case From Salesforce | <a href="#">Link</a> | High     | Get Reply Create Reply Edit Case Get Attachment |
| 2  | A completed case                      | <a href="#">Link</a> | Low      | Get Reply Create Reply Edit Case Get Attachment |

First Prev Next Last

Viewing 3 of 3 page

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Content

Resource URL

Attachment Link

This is a case that I created a while ago. Because it is now closed, you cannot reopen or modify it. If I try to get in touch again Kayako will create a brand new case for me. We haven't set up any test agents for you because we don't want to use up your precious user licenses. Replies from your team will look like this:

[Link](#)

Cases Related to Contact : Geeta Garg

viii) For getting attachments of the Case, Click on “**Get Attachment**” button. If Attachment is existing then the user will be displayed the attachment link otherwise “**There is no attachment**” message will be displayed on popup window.

The screenshot displays the Salesforce Kayako interface. At the top, there is a search bar and navigation tabs for Home, Contacts, Cases, and Kayako Credentials. The main section is titled "Perform Kayako Operation" and includes buttons for "Retrieve Cases" and "Create Case". A "Download Attachments" popup is visible. Below this, a table titled "Cases Related to Contact : Geeta Garg" lists five cases. Each case row includes buttons for "Get Reply", "Create Reply", "Edit Case", and "Get Attachment".

| ID | Subject                    | Resource URL         | Priority | Status | Type     | Created date              | Action  |
|----|----------------------------|----------------------|----------|--------|----------|---------------------------|---|
| 16 | Thanks you case            | <a href="#">Link</a> | Normal   | New    | Question | 2016-09-12T07:09:59+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 15 | Testing 12 September 123   | <a href="#">Link</a> | Low      | Open   | Question | 2016-09-12T05:11:46+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 14 | HTML Content Testing ###02 | <a href="#">Link</a> | Low      | New    | Question | 2016-09-09T12:48:50+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 13 | HTML Content Testing ###01 | <a href="#">Link</a> | Low      | New    | Question | 2016-09-09T12:45:08+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |
| 12 | HTML Content Testing       | <a href="#">Link</a> | High     | New    | Problem  | 2016-09-09T12:41:29+00:00 | <a href="#">Get Reply</a> <a href="#">Create Reply</a> <a href="#">Edit Case</a> <a href="#">Get Attachment</a> |

Viewing 1 of 4 page

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