

Kayako connect

Connect Salesforce with Kayako

USER MANUAL

Astrea IT Services

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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.

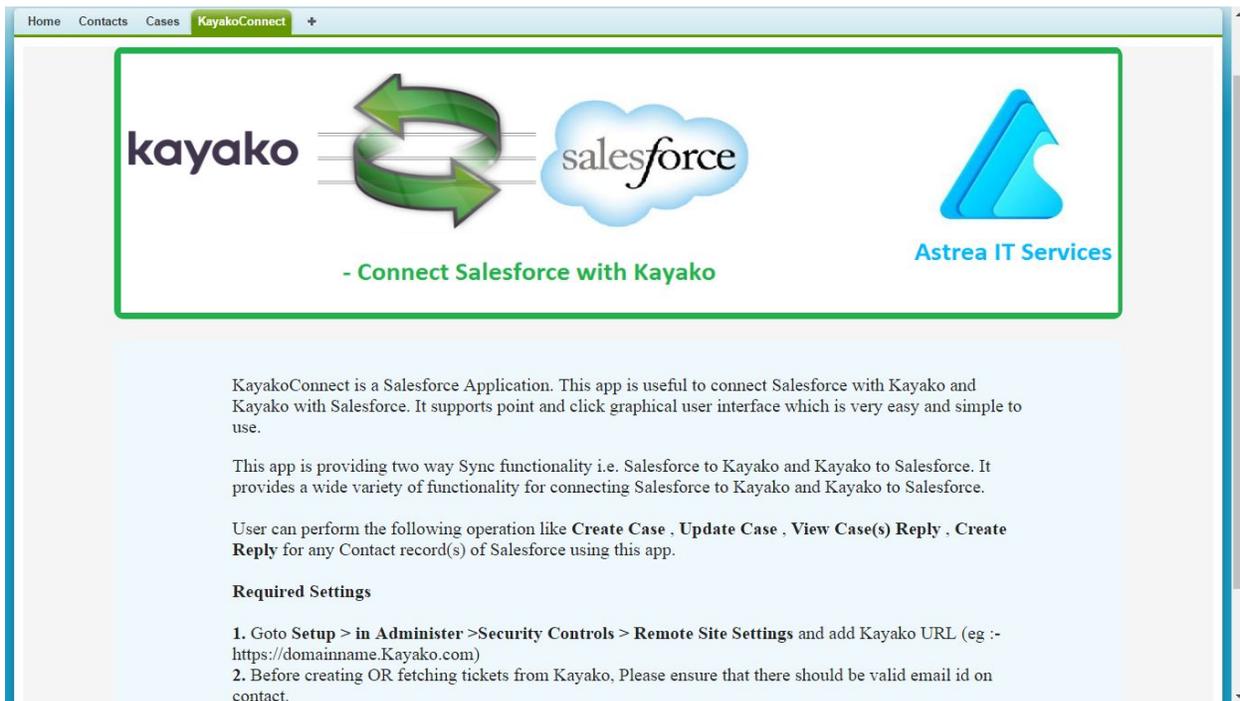
The app is providing bi-directional Sync functionality i.e. Salesforce to Kayako and Kayako to Salesforce. It provides a wide variety of functionality for connecting Salesforce to Kayako and vice versa.

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** +

kayako  **salesforce** 

- Connect Salesforce with Kayako **Astrea IT Services**

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>

He

Remote Site Detail Edit Delete Clone 

Remote Site Name	KayakoEndpoint	Modified By	Sunil Sharma , 9/7/2016 4:53 AM
Remote Site URL	<input type="text" value="https://astrea.kayako.com"/>		
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... Help for this Page ?

New Contact

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-- Phone

Last Name Home Phone

Account Name Mobile

Title Other Phone

Department Fax

Birthdate Assistant

Reports To Asst. Phone

Lead Source --None--

Requested Id

Address Information Copy Mailing Address to Other Address

Mailing Street Other Street

Mailing City Other City

Mailing State/Province Other State/Province

Mailing Zip/Postal Code Other Zip/Postal Code

Mailing Country Other Country

Additional Information

Languages Level --None--

Enter Valid Email Id → Email

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

Section	Asst. Phone	Created By	Do Not Call	Fax Opt Out	Last Stay-in-Touc...	Mailing Address	Other...
Blank Space	Birthdate	Data.com Key	Email	Home Phone	Last Stay-in-Touc...	Mobile	Phone
Account Name	Clean Status	Department	Email Opt Out	Languages	Lead Source	Name	Report
Assistant	Contact Owner	Description	Fax	Last Modified By	Level	Other Address	Reque

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 Phone 1-415-555-1212

Account Name Sample Account Home Phone 1-415-555-1212

Title Sample Title Mobile 1-415-555-1212

Department Sample Department Other Phone 1-415-555-1212

Birthdate 9/9/2016 Fax 1-415-555-1212

Reports To Sample Contact Email sarah.sample@company.com

Lead Source Sample Lead Source Assistant Sample Assistant

Requested Id Sample Requested Id Asst. Phone 1-415-555-1212

Address Information (Header visible on edit only)

Mailing Address Suite 300, The Landmark @ One Market Other Address Suite 300, The Landmark @ One Market
San Francisco, CA 94105 San Francisco, CA 94105
US 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 navigation bar includes Home, Contacts, Cases, and Kayako Credentials. The left sidebar shows a 'Recent Items' list with several entries for Sunil Sharma and phone numbers. 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. The 'Connect with Kayako' button is highlighted with a red box, and an arrow points to it from the text 'Click on "Connect with kayako" button'. Below the contact details are sections for 'Cases' and 'Kayako Credentials', both showing 'No records to display'. The bottom of the page features the Salesforce logo, a search bar, and the navigation bar.

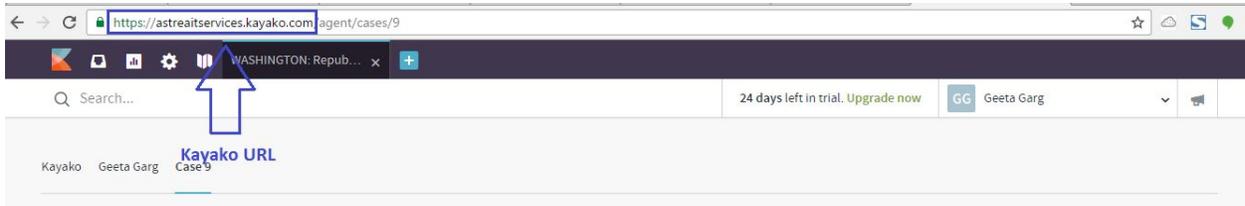
The screenshot shows the Salesforce login page. It features the Salesforce logo on the left, a search bar in the center, and the navigation bar at the bottom with Home, Contacts, Cases, and Kayako Credentials. The page is mostly blank, with the navigation bar and search bar being the primary elements.

UserName

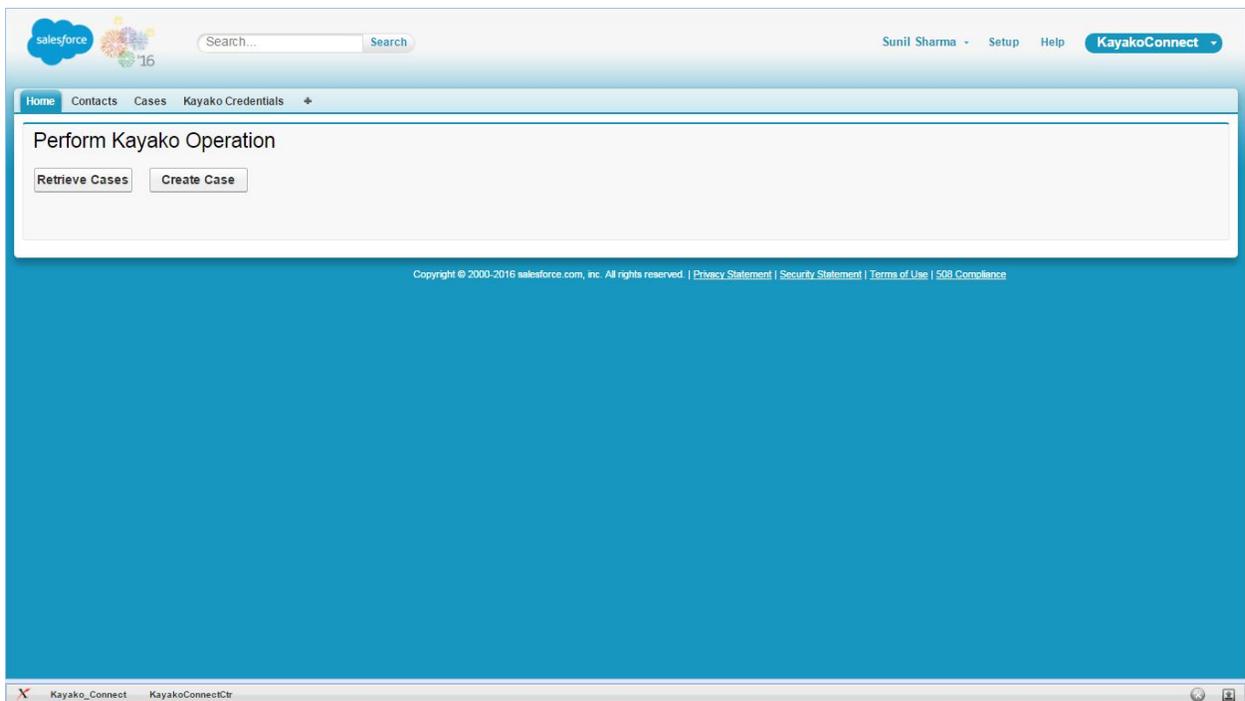
Kayako URL

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' interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and user information (Sunil Sharma, Setup, Help, KayakoConnect). Below the navigation bar, there are tabs for Home, Contacts, Cases, and Kayako Credentials. The main content area is titled 'Create Case' and 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 containing icons for undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, and text color.
- Type**: A dropdown menu with 'Question' selected.
- Priority**: A dropdown menu with 'Low' selected.
- Assigned User**: A dropdown menu with 'Sunil Sharma' selected.

At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'. The footer of the page contains the copyright notice: 'Copyright © 2000-2016 salesforce.com, inc. All rights reserved. | Privacy Statement | Security Statement | Terms of Use | 508 Compliance'.

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 shows the Salesforce interface for Kayako. At the top, there is a search bar and navigation links for Home, Contacts, Cases, and Kayako Credentials. The main heading is "Perform Kayako Operation" with buttons for "Retrieve Cases" and "Create Case". Below this is a table titled "Cases Related to Contact :". The table has columns for ID, Subject, Resource URL, Priority, Status, Type, Created date, and Action. The Action column contains buttons for "Get Reply", "Create Reply", "Edit Case", and "Get Attachment".

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

At the bottom of the table, there are navigation buttons: "First", "Prev", "Next", and "Last". The page indicates "Viewing 1 of 3 page".

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*

Type

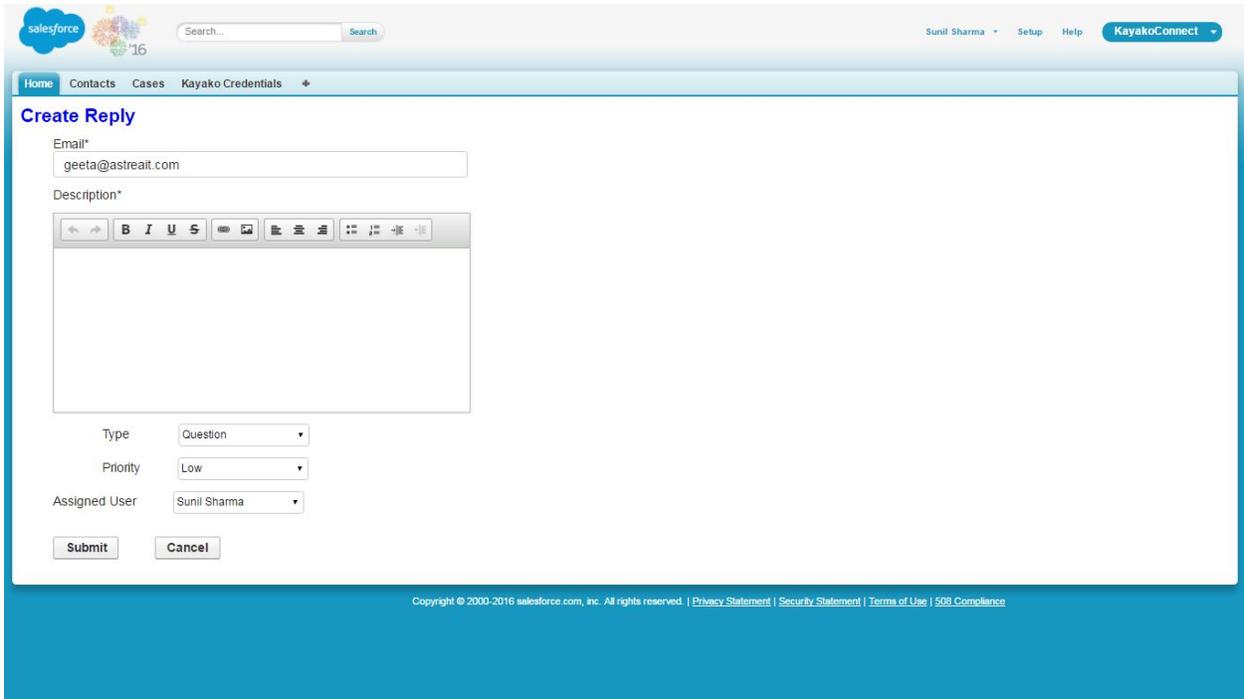
Priority

Status

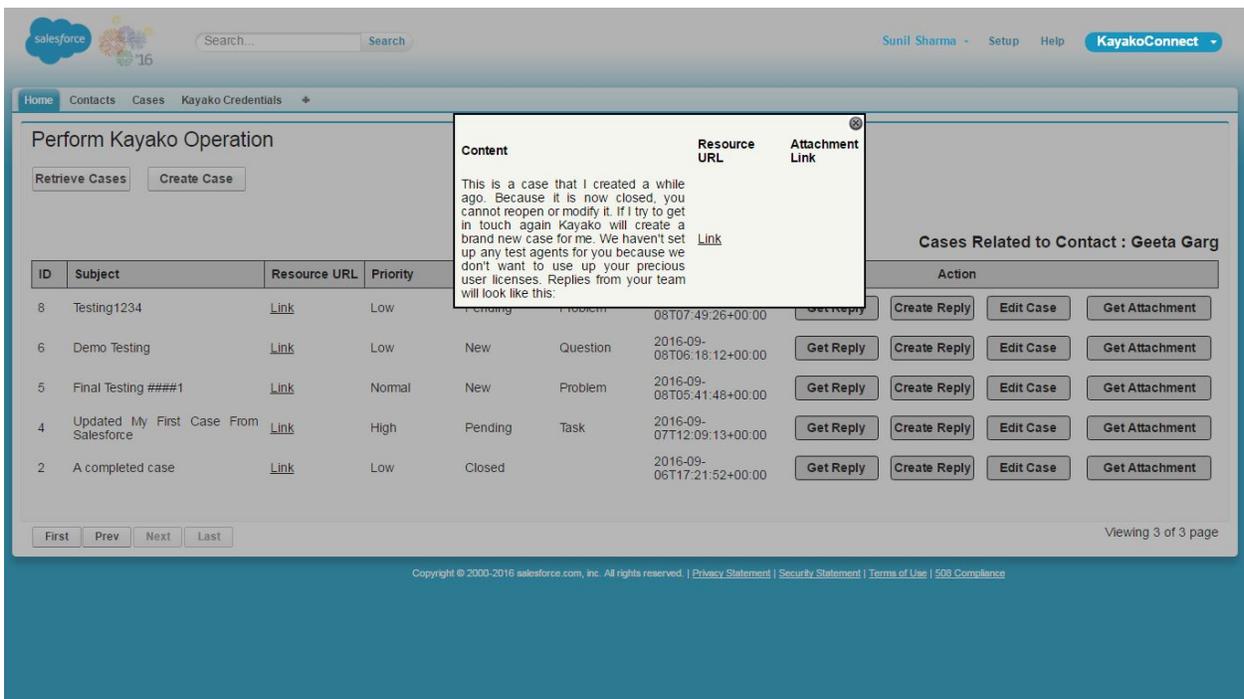
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vi) To create the reply on case, click on “**Create Reply**” button. After filling all the details, User will click on “**Submit**” button.

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.



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.



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.

salesforce 16 Search... Search Sunil Sharma - Setup Help KayakoConnect

Home Contacts Cases Kayako Credentials +

Perform Kayako Operation Download Attachments

Retrieve Cases Create Case

Cases Related to Contact : Geeta Garg

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

First Prev Next Last Viewing 1 of 4 page

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