

STAFFINO FEEDBACK

Installation and Configuration Manual



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INSTALLATION INSTRUCTION

To install Staffino Feedback solution you need to have Dynamics CRM online tenant or on premise installation with version 2015 or later. For solution installation please follow the steps below.

Download

Download the solution from Staffino web page or Dynamics AppSource or contact Staffino directly to provide you with installation package e.g. „StaffinoFeedback_1_0_0_x_managed.zip“.

Solution selection

Open your cloud or on premise Dynamics CRM application and navigate to „Settings“ -> „Solutions“

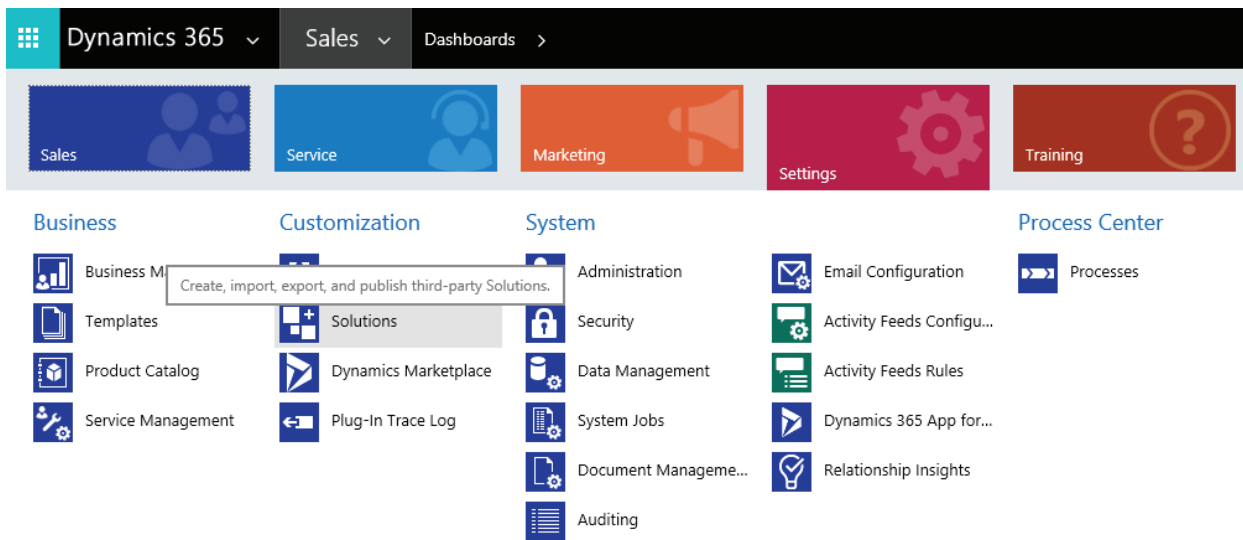


Figure 1 Select Solution

Import Solution

In solution list applet, click on “Import” button.

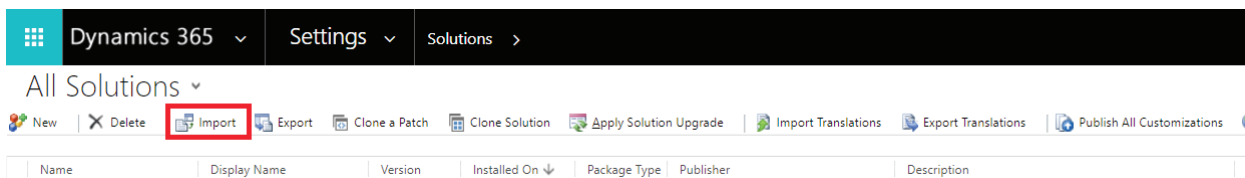


Figure 2 Import Solution

Select Solution Package

Browse for downloaded solution in your local computer and follow import wizard.

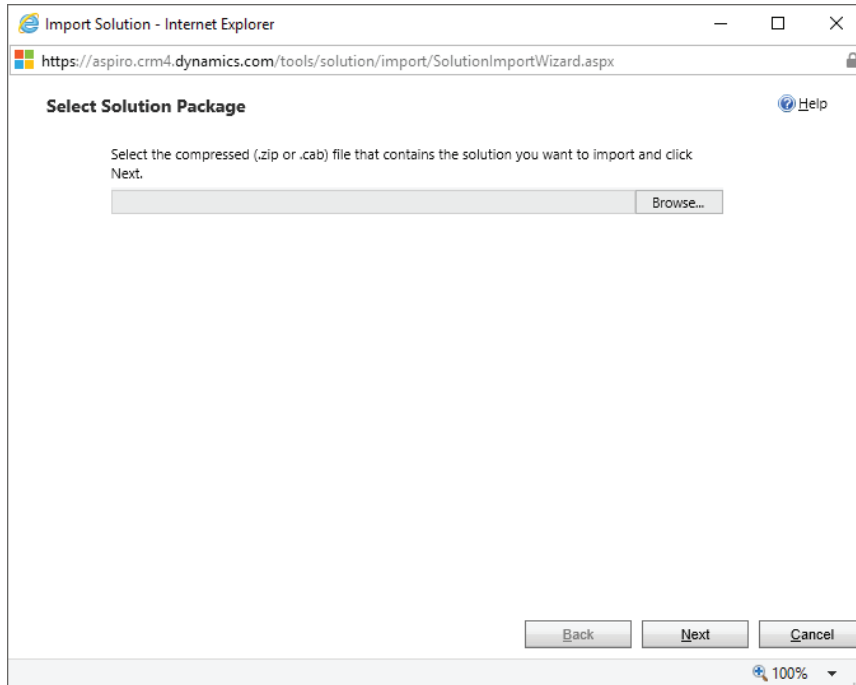


Figure 3 Select Solution Package

IMPORT OPTIONS

Enable any SDK message processing steps included in the solution and click "Import"

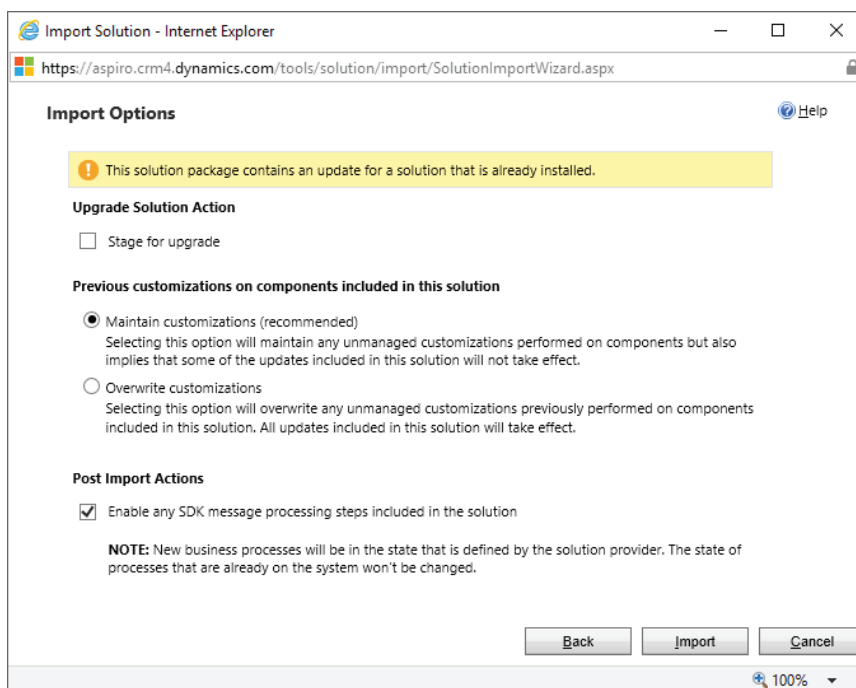


Figure 4 Import Options

CONFIGURATION

After successful installation of the Staffino Feedback solution it is necessary to configure couple parameters to work properly.

Open Solution

Open solution from list of installed solutions

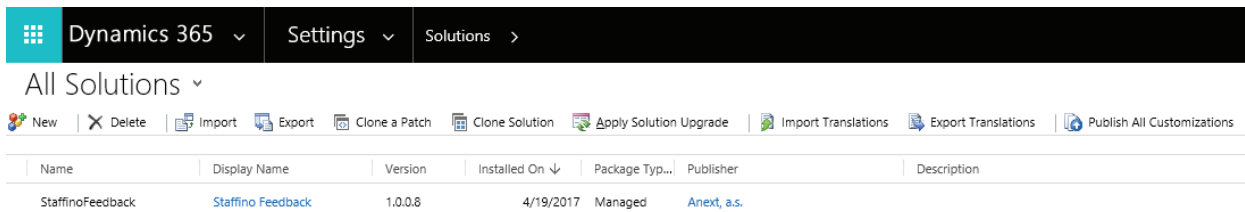


Figure 5 Open Solution

Configuration Page

Configuration page of Staffino Feedback will display

Property	Values	Description
Proxy Settings		
Use proxy	Bool	Using proxy enabled/disabled
Url	String	Url to proxy server for access to
Domain	String	Proxy authentication - Domain
Username	String	Proxy authentication - Username
Password	String	Proxy authentication - Password
Registration Settings		
API Token	String	Staffino API authentication token

Table 1 Connection Settings

Staffino Feedback Settings

Proxy Settings

Use proxy

Url

Domain

Username

Password

Registration Settings

API Token

Basic Settings

Use Images

Synchronization Settings

Frequency

Interaction Settings

Interaction processing

Listen for an email activity

Listen for a fax activity

Listen for a phone call activity

Listen for a meeting activity

Listen for a case activity

Interaction Types

New

Interaction Type

Activity Type

User related

SMS

Interaction Type	Activity Type	User related	SMS	Action
Phone Call	phonecall	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	inactivate
Meeting	appointment	<input type="checkbox"/>	<input type="checkbox"/>	inactivate
Order		<input type="checkbox"/>	<input type="checkbox"/>	inactivate
Service		<input type="checkbox"/>	<input type="checkbox"/>	inactivate
Invoice		<input checked="" type="checkbox"/>	<input type="checkbox"/>	inactivate

Figure 6 Configuration Page

Property	Values	Description
Basic Settings		
Use Images	Bool	Employee images will be used from system user connected to Staffino employee record
Synchronization Settings		
Frequency	Option	Every 10 minutes/Hourly/ Twice a day/Daily Synchronization from Staffino frequency (Venues, Employees, Customers, Interactions, Feedbacks, Messages)
Interaction Settings		
Interaction Processing	Option	Immediately/After 10 minutes/Disabled Option to send new interactions to Staffino automatically
Listen for an email activity	Bool	Option to create Interaction after email activity
Listen for a fax activity	Bool	Option to create Interaction after fax activity
Listen for a phone call activity	Bool	Option to create Interaction after phone call activity
Listen for a meeting activity	Bool	Option to create Interaction after meeting activity
Listen for a case activity	Bool	Option to create Interaction after case activity
Interaction Types		
There is a place to define own interaction types to manual feedback request to customer. Interaction type can be user. This type of interaction type allows you choose concrete employee to get feedback for. If interaction type is not user related, you can choose in feedback request only venue.		

Table 2 Solution parameters

Registration

To obtain registration settings you can make registration through „Registration“ button at the bottom of the configuration page.

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