

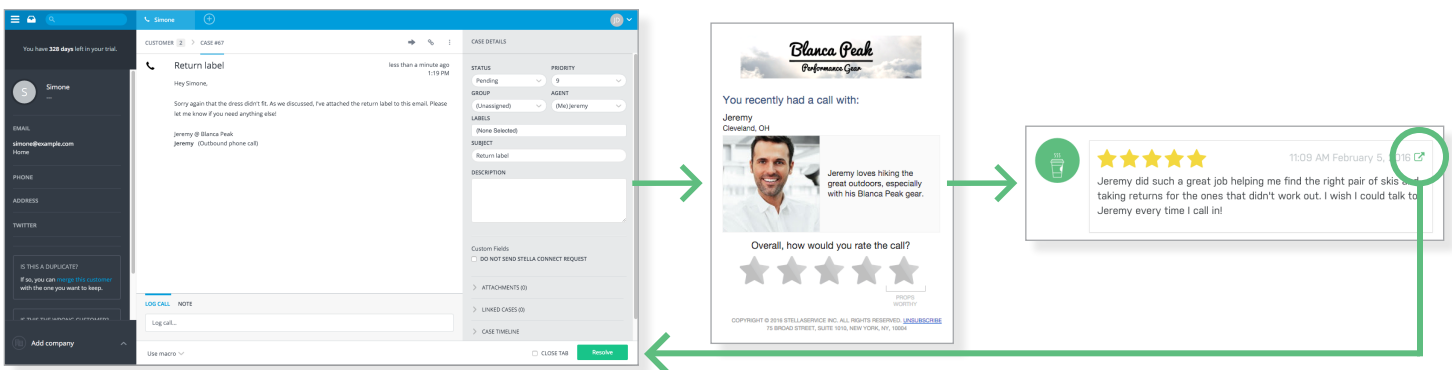
Stella Connect Desk.com Integration

Stella Connect is a powerful tool for gathering realtime customer feedback. With the release of the new Stella Connect Desk.com integration, clients can now further streamline the process for gathering this feedback. Through this integration, you will be able to automatically trigger feedback requests after each customer interaction, and easily return to the original Desk.com ticket from the Connect Stream, ensuring the platform delivers maximum benefits with zero impact on your existing workflow.

Closing a case triggers Stella Connect, removing selection bias and workflow inefficiencies

Customers receive the Stella Connect request immediately

Agents and Managers can link back to the original ticket, facilitating follow-up



Process

The Stella Connect Desk.com integration is easy to implement, with minimal configuration time and nothing to install. Once configured and tested, there should be no ongoing technical maintenance required. Stella Connect's implementation team will be on hand to guide you through the following steps:

Step One: Request and Retrieve your Test Credentials

Step Two: Configure Your Account For Testing

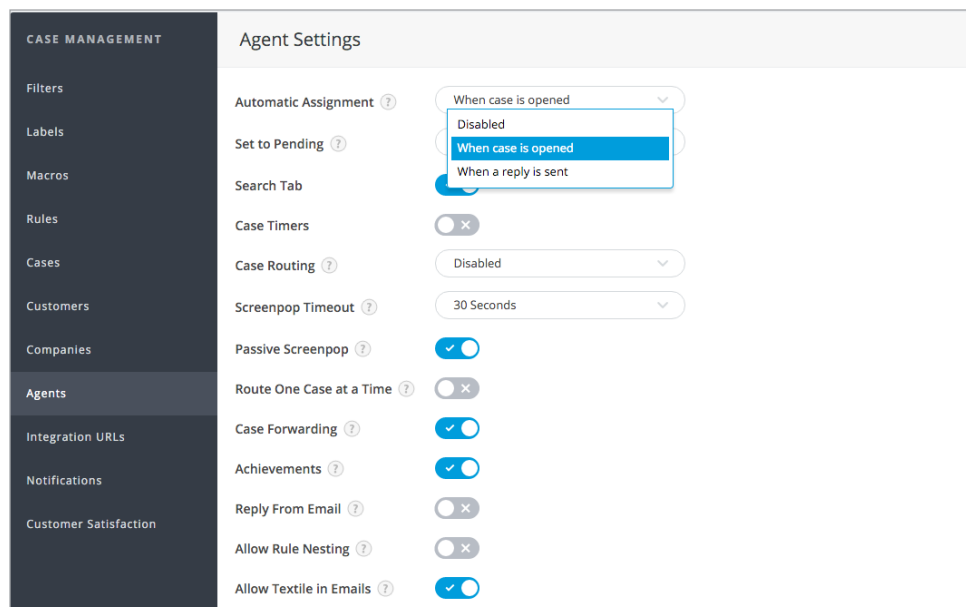
Step Three: Test and Monitor Results

Step Four: Go Live

Before You Begin

At the core of Stella Connect is the ability to forge connections between your team and your customers. To ensure that Stella Connect is in the best position to help you do so, please keep the following in mind:

1. We assume that all customer interactions are handled via Desk.com. If that is not the case, please talk to the Stella Connect Implementation team before starting the integration process
2. A Connect request can *only* be sent if an email address is associated with the customer's record.
3. A Connect request can *only* be sent if a member of your team is assigned to the case when it is Solved.
 - a. This can be handled manually by your team as tickets are created and Solved
 - b. You can also configure Desk.com to assign ticket ownership automatically:
 - i. Navigate to **Desk Admin > Cases > Agents > Automatic Assignment**
 - ii. You can set Automatic Assignment to map to your preferred business process:
 - iii. To always send Connect requests on behalf of the agent who opens the case, select **"When case is opened"**

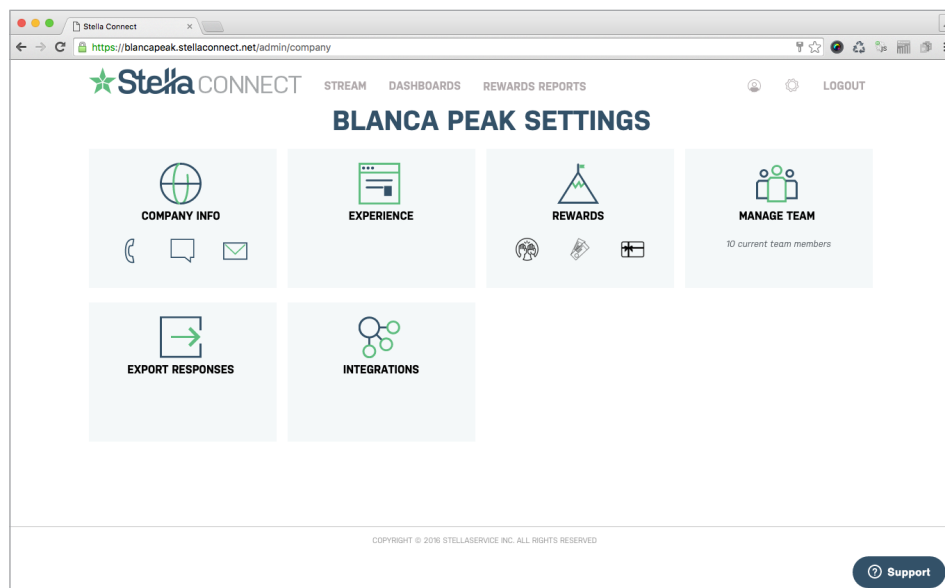


4. A Connect request can *only* be sent if the team member has an approved Stella Connect profile.

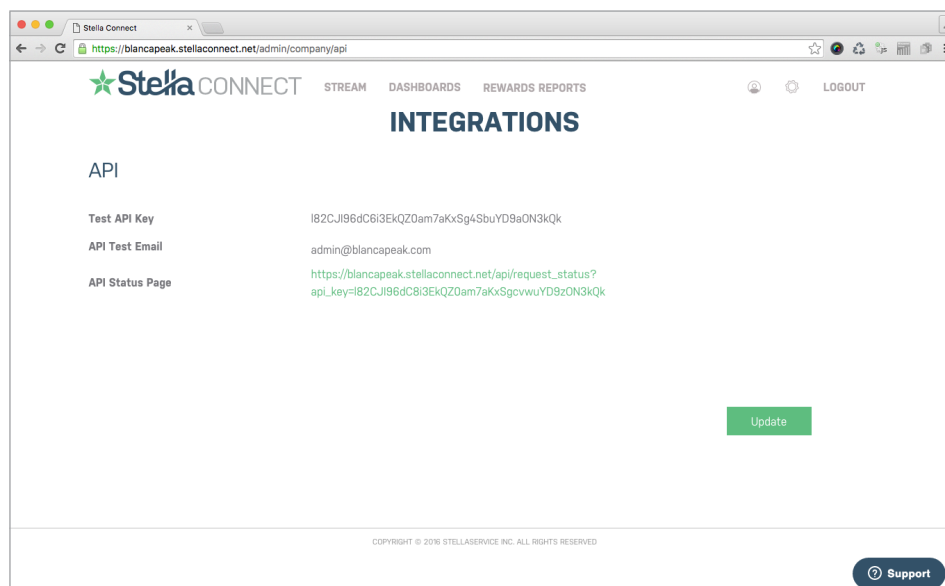
Step One: Request and Retrieve Your Test Credentials

Testing the Desk.com integration begins with your company designating a test email address that will be used during testing, and requesting test credentials.

1. Once a member of the Stella Connect implementation team establishes your credentials, a new link will appear in your **Stella Admin Settings Page** titled **Integrations**.



2. This page will display your available API keys and provide a link to the **API Status** page.

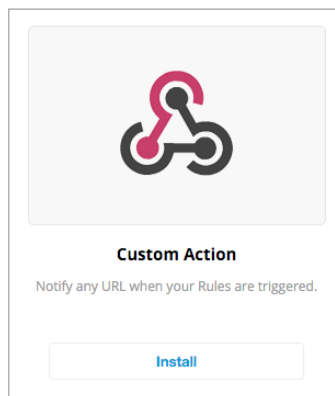


Step Two: Configure Your Desk.com Account for Testing

Once you have received your test credentials, you can begin configuring your Desk.com account to automatically send Stella Connect requests.

Create a Custom Action

1. Navigate to the Desk.com Admin > Apps > Custom Action > Install > Install Custom Action.



2. Accept the terms.
3. Fill out the action details per the table below, then click "Create"

Install Custom Action	
Name	Stella Connect
Authentication Method	Basic Auth
URL	https://api.stellaconnect.net/v1/auth
User name	stellaconnect
Password	
Active	☒
Create or Cancel	

Name: Stella Connect

Authentication Method: Basic Auth

URL: https://api.stellaconnect.net/v1/auth

User name: stellaconnect

Password: Insert the Test API keys from your Stella Connect Admin

4. Once you have created the action, you will then configure the action to send Stella Connect requests. Fill out the details per the table below, then click "Add Action" to save.

CREATE A NEW ACTION

Name

Send Stella Connect Request to Customer

Action Type

POST a JSON string to a URL

Appended URL path (optional)

/some/url/path

JSON to POST

```
{
  "employee": {
    "email": "{{case.user.email}}"
  },
  "channel": "{{case.channel}}",
  "customer": {
    "name": "{{case.customer.name}}",
    "email": "{{case.customer.email}}"
  }
}
```

To **Trigger this App Action**, you must add it to a Business Rule. You can [learn more](#) about Business Rules or [start using it](#) once you've saved this Action.

Rules using this Action

1. None

Cancel

Add Action

Name: Send Stella Connect Request to Customer

Action Type: POST a JSON string to a URL

Appended URL path: (leave this blank)

JSON to POST: copy and paste the highlighted text into the text box

```
{
  "employee": {
    "email": "{{case.user.email}}",
    "channel": "{{case.channel}}",
    "customer": {
      "name": "{{case.customer.name}}",
      "email": "{{case.customer.email}}",
      "ext_interaction_id": "{{case.id}}",
      "do_not_send": "{{case.custom_do_not_send_connect_request}}",
      "external_url": "https://{{site.subdomain}}.desk.com/web/agent/case/{{case.id}}"
    }
  }
}
```

Establish A Business Rule to Automate Stella Connect Requests

Once a Custom Action has been created, you will then need to add it to a Business Rule (or set of Business Rules) within your Desk.com account.

To establish a new Business Rule to send Stella Connect Requests to a customer once a case is resolved:

1. Navigate to your existing set of Business Rules for Resolved cases at **Desk.com Admin > Cases > Rules > Case Resolved**.

2. Click **Add Rule**.

3. Enter the following details in the rule:

a. Add Two "All" Conditions to require a customer email address and an agent assignment

i. [Customer Email Address] [contains] [@]

ii. [Case Assigned Agent] [is not] [(Unassigned)]

b. Add “Any” Conditions for each of the Channel(s) that you want to automate

i. [Case Channel] [is] [Phone call]

ii. [Case Channel] [is] [Email]

iii. [Case Channel] [is] [Chat]

c. Add a Rule Action to trigger the Custom Action that you established above

i. [Trigger an App Action] [Send Stella Connect Request to Customer]

d. Enable the rule by toggling it on

EDIT CASE RESOLVED RULE

Event Type

Case Resolved

Name

Send Stella Connect Request to Customer

Add “All” Condition

Customer Email Ad...

contains

@

Delete

☐ Use Regular Expression

Case Assigned Agent

is not

(Unassigned)

Delete

Add Condition

Add “Any” Condition

Case Channel

is

Chat

Delete

Case Channel

is

Email

Delete

Case Channel

is

Phone Call

Delete

Case Channel

is

Call Back

Delete

Add Condition

Rule Actions

Trigger an App Acti...

Stella Connect: Sen...

Delete

Add Action

Run Rule

Anytime

Enabled

☒

Cancel

Update

Optional Customization: Allow Agents to Manually “Suppress” a Connect Request

Although we recommend that all resolved cases receive a Stella Connect request, there may be some instances in which you do not want to send one. You can manage this process by establishing exclusion rules within your company's Desk.com account.

First, create a custom field to allow suppressions of Stella Connect requests in specific circumstances.

1. Navigate to **Desk.com Admin > Cases > Cases (in the left bar) > Custom Fields**.
2. Click the **"Add Field"** button
3. Name the Custom Field:

ADD CASE CUSTOM FIELD

Name ?

Do not send Stella Connect Request

Key ?

do_not_send_connect_request

Data Type

True/False

Cancel

Add

Name: Do Not Send Stella Connect Request

Key: do_not_send_connect_request

Data Type: True/False

4. Click "Add"

This new field will show up automatically on your case layout.

CASE #67

CUSTOMER Simone

COMPANY N/A

INFO LINKS

SUBJECT

Return label

STATUS

Resolved

PRIORITY

9

GROUP

(Unassigned)

AGENT

(Me)

DESCRIPTION

LABELS

DO NOT SEND STELLA CONNECT REQUEST

☐

DIRECT CASE LINK

<https://zzz-stellaservice1.desk.com/agent/case/67>

0 LINKS

Add

0 ATTACHMENTS

Add

Classic Agent View

JD

CASE DETAILS

STATUS

Resolved

PRIORITY

9

GROUP

(Unassigned)

AGENT

(Me) Jeremy

LABELS

(None Selected)

SUBJECT

Return label

DESCRIPTION

Custom Fields

☐ DO NOT SEND STELLA CONNECT REQUEST

ATTACHMENTS (0)

Next Gen Agent View

Optional Customization: Configure Automated Exceptions

Although we recommend that all resolved cases receive a Stella Connect request, there may be some instances in which you do not want to send one. You can manage this process by establishing specifying rules in which you would use the "Do Not Send" flag.

First, create rules that trigger the "Do Not Send" exception.

EDIT CASE RESOLVED RULE

Event Type

Case Resolved

Name

Automatically do not send Stella Connect Request

Add "All" Condition

Case Labels

contains

account_close

Delete

Add Condition

Add "Any" Condition

Add Condition

Rule Actions

Set Case Do not se...

True

Delete

Add Action

Run Rule

Anytime

Enabled

☒

Cancel

Update

Next, to make sure that the system will check your desired business rules before sending a Stella Connect request, toggle the rule "on", and ensure that the "Exception" trigger that you created is ordered above the "Send" Stella Connect Request triggers within your Rule list.

2 Rules

Add Rule

Search

☒

Automatically do not send Stella Connect Request

IF (Case Labels contains account_close) THEN Set Case Do not send Stella Connect Request true
Updated on Mar 02 2016 at 8:54pm

1

☒

Send Stella Connect Request to Customer

IF (Customer Email Addresses contains @ AND Case Assigned Agent is not (Unassigned)) AND (Case Channel is Chat OR Case Channel is Email OR Case Channel is Phone Call OR Case Channel is Call Back) THEN Trigger an App Action Send Stella Connect Request to Customer
Updated on Mar 02 2016 at 8:42pm

2

STELLA CONNECT DESK.COM INTEGRATION 2016

8

Remember, these exceptions are different than limiting how many emails a single customer gets within a specified time period. That "suppression period" can be set on the "Experience" page within the Stella Connect Admin site.

Prepare for Testing

That's it! As tickets gets Solved, test emails will now be sent to the test email that you specified.

Step Three: Test and Monitor Results

During the testing period, Stella Connect requests will be sent to the API test email account that you specified during set-up, allowing you to monitor activity and identify any potential issues using both the Desk.com log and Stella Connect API status pages.

Your agents will continue to send Connect requests to customers manually while you test.

Stella recommends monitoring the results in test mode for **1 week** in order to surface most scenarios and edge cases before going live. For each error found, discover the root cause for the error, and determine the most appropriate resolutions. See the Maintenance/Troubleshooting section of this document for details.

Please reach out to Stella Connect support for assistance.

Step Four: Go Live

Request Production Credentials

When you are ready to go live, email **connectsupport@stellaservice.com** to request your production API key.

Provide a list of email addresses that should be notified if there are live production errors. (See 'Maintenance/Troubleshooting' section below for more details.)

Activate Your Production Credentials

Once you receive your production API key from the Stella Connect Implementation team, navigate back to the settings page for Stella Connect (**Desk.com Admin > Apps > Stella Connect > Settings**) and insert the key in the "New Password" field, then click "Update."

Settings

Uninstall

Name

Stella Connect

Authentication Method

Basic Auth

URL

https://api.stellaconnect.net/v1/auth

User name

stellaconnect

New Password

Active

☒

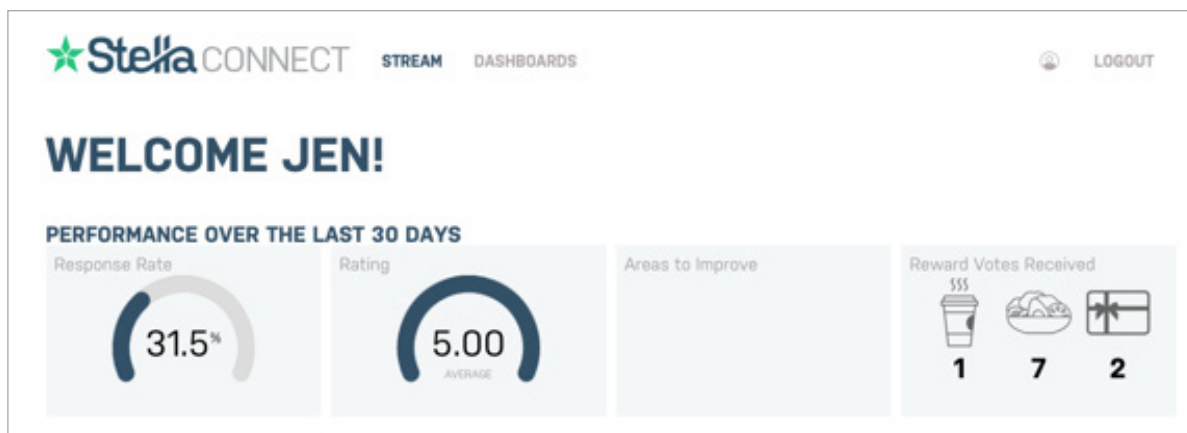
Update

or Cancel

Monitor Activity

Once the API key has been updated with the production credentials, the API request status page will only show Invalid Requests and will not display every successful request here. The email provided at the setup of this integration will also get alerted if more than 5% of requests are resulting in an error.

Notify Your Team



Confirm Go-Live

To finalize your integration, contact connectsupport@stellaservice.com to confirm the date and time that you would like to start sending Connect requests automatically to customers.

The Stella Connect team will activate your integration. Once activated, Connect requests will be sent to customers, and the "Send a Request" box will be removed from the Stella Connect Stream.

Maintenance / Troubleshooting

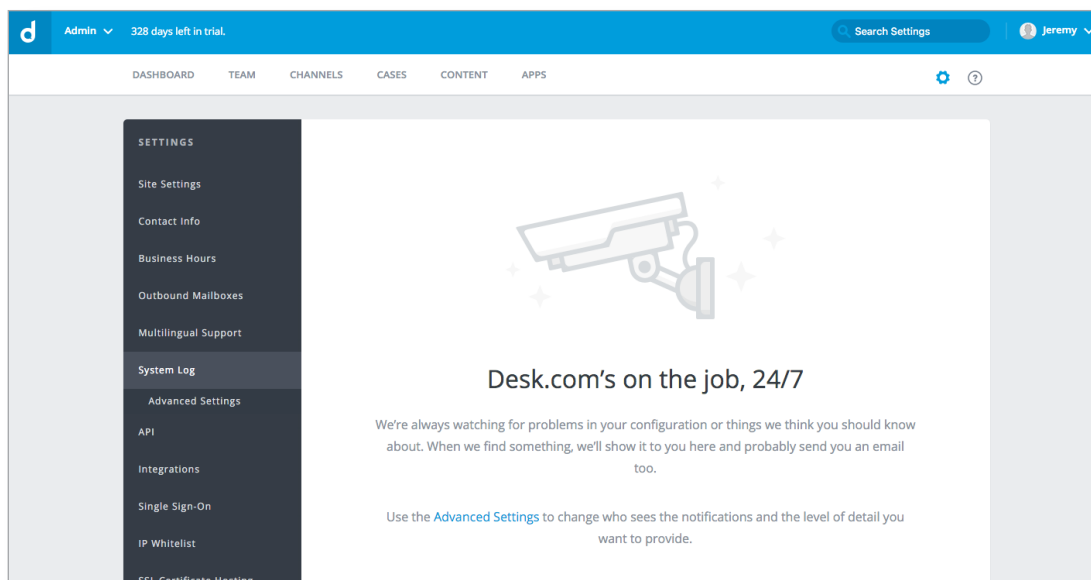
Once your integration is live, StellaService will notify you of any issues as they occur. In the event that >5% of your requests have an error related with them within the period of 1 hour, Stella will automatically notify the team members that you specified during set-up.

It is also a good practice to review the Desk.com System Logs and the Stella Connect API Status page from time to time.

Monitoring Errors in Desk.com System Logs

If errors occur while requests are being made from Desk.com, you will only see those in the Desk.com System Logs.

- Navigate to **Desk.com Admin > Gear icon in top right > System Log**.
- Any errors that occur in communicating with the Stella Connect API will be logged here.



Monitoring Errors in Stella Connect Admin

You can monitor all of the Stella Connect requests, and any errors encountered, via the Stella Connect API status pages.

- Navigate to **Stella Connect > Gear icon in top right > Integrations > API Status Page**
- Once received by the Stella Connect API, two types of requests will be logged here.
 - All the requests made from the **test** API keys
 - All errors in request processing from either the **test** or **production** API keys

Stella

CONNECT

STREAM

DASHBOARDS

REWARDS REPORTS



LOGOUT

Invalid Requests (5)

Test Requests (18)

Search:

Per page: 100 

Download

Date	Employee	Customer	Channel	Do Not Send	IDs
2016-02-03 17:33:20 -0500 Employee not found Employee profile not complete	Dunne, Jeremy jeremy@blancapeak.com	Simone simone@example.com	phone		External: UUID: 205c8daf-cac6-11e5-a2ff...
2016-02-01 19:48:41 -0500 Employee not found Employee profile not complete	jackie@blancapeak.com	Darien dmaxwell@example.com	chat		External: UUID: b493157f-c946-11e5-bfab...
2016-02-01 19:42:16 -0500 Employee not found Employee profile not complete	jackie@blancapeak.com	Suzie suzie@exmaple.com	chat		External: UUID: cecdac2d-c945-11e5-938...
2016-02-01 19:40:36 -0500 Employee not found Employee profile not complete	jackie@blancapeak.com	Brad brad@example.com	phone		External: UUID: 9372f8e0-c945-11e5-9a1...
2016-01-29 15:55:51 -0500 Employee not found Employee profile not complete	amanda@blancapeak.com	Leyla leyla@example.com	email		External: UUID: ae28a282-c6ca-11e5-83...

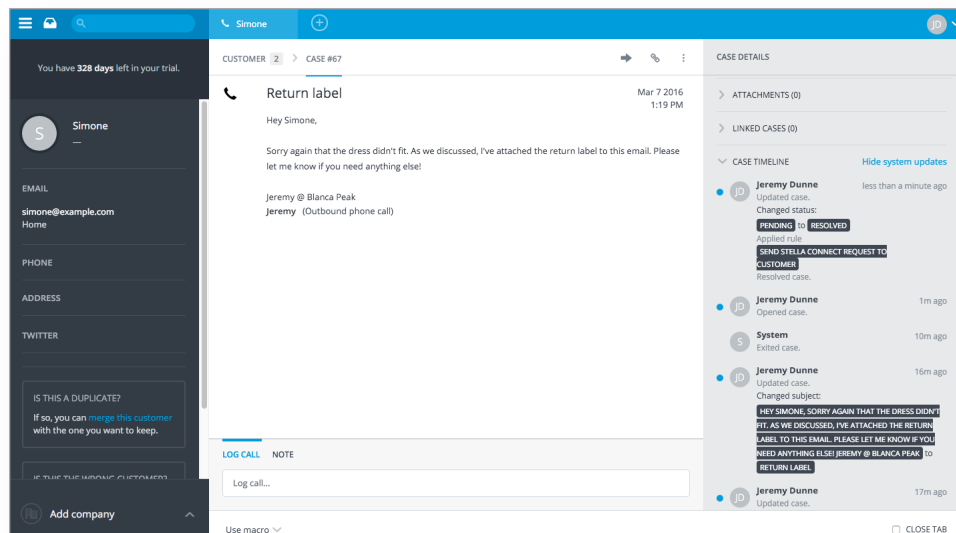
<

1

>

The below table will help you understand the different errors you may see in Stella Connect.

Error	Explanation
Employee profile not complete	The employee was found, but does not have a complete and approved profile in Stella Connect.
Deactivated employee	This employee was found, but has been deactivated and would need to be reactivated in order to send Connect requests.
Employee not found	This employee could not be found. The employee's email address will be displayed in the adjacent column.
Invalid Customer	There was an issue with the format of the name or email that was provided.
Channel not enabled for company	This channel has not been enabled in Stella Connect. This can be enabled in the Company Info page. You will also want to confirm that the Consumer Experience for that newly enabled channel reflect your desired copy.
Channel is in manual mode	This error will only show if you are using a production API key but have not switched that channel from manual to integrated mode.



Within Desk.com, you can view a case's history to see what actions have run in the background and understand where something could have gone wrong. Use the **Case Timeline** tab on the right panel of a case view.

Re-Enabling Stella Connect After Errors

If there are errors on the Desk.com System Log, Desk.com will automatically disable the integration until it's fixed. Once you have updated the problem, to re-enable the integration, follow these steps:

1. Desk.com Admin > Apps > Stella Connect
2. Click **Settings** next to Custom Action
3. Re-enable the **Active** toggle switch.
4. Click **Update**.

Name

Stella Connect

Authentication Method

Basic Auth

URL

https://api.stellaconnect.net/v1/auth

User name

stellaconnect

New Password

Active

☐

Update

or Cancel

Name

Stella Connect

Authentication Method

Basic Auth

URL

https://api.stellaconnect.net/v1/auth

User name

stellaconnect

New Password

Active

☒

Update

or Cancel

Need more information? We're here to help. Contact connectsupport@stellaservice.com.