

CustomerGauge

Data In & out CustomerGauge



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Data In/Out of CustomerGauge

Easily get data into and out of CustomerGauge

Multiple options available to suit every need – SFTP, API, In-Application & CRM Integrations

Flexible & Secure

Type and Import | **Map your data** | Confirm file upload

Map your data
Please check that your data is mapped to the correct CustomerGauge data field below. To change it, select an alternative from the drop down list or choose to ignore it.


Mandatory Fields: Email, First Name, Last Name


Source Field	First Record Value	CustomerGauge Field
CustomerNumber	2665	Customer Number
Email	trishaala.chengappa@directness.net	Email
Telephone	3112356789	SMS Telephone


First Name
Last Name
Salutation
Job Position
Job Level
Company Number
Company
Segment A
Agent Name
Agent Email
Country
Division
Currency


Import Data

Choose your preferred upload method below:


Upload File
Upload csv, xml and xls file here.


Copy Paste Data
Copy paste the content of your csv or xls file.


Manual Record
Add a contact to your address book quickly.

 Read more about data standards [here](#)

Upload History

Upload Status | Pending For Approval | Automatic Import

Status	File Name	Upload Date	# Total	# Success	# Errors	% Success
Success	test_contactlist_basic_5000_5.xls	2014-10-02 13:31:51	5505	5504	1	99.98

What's covered?

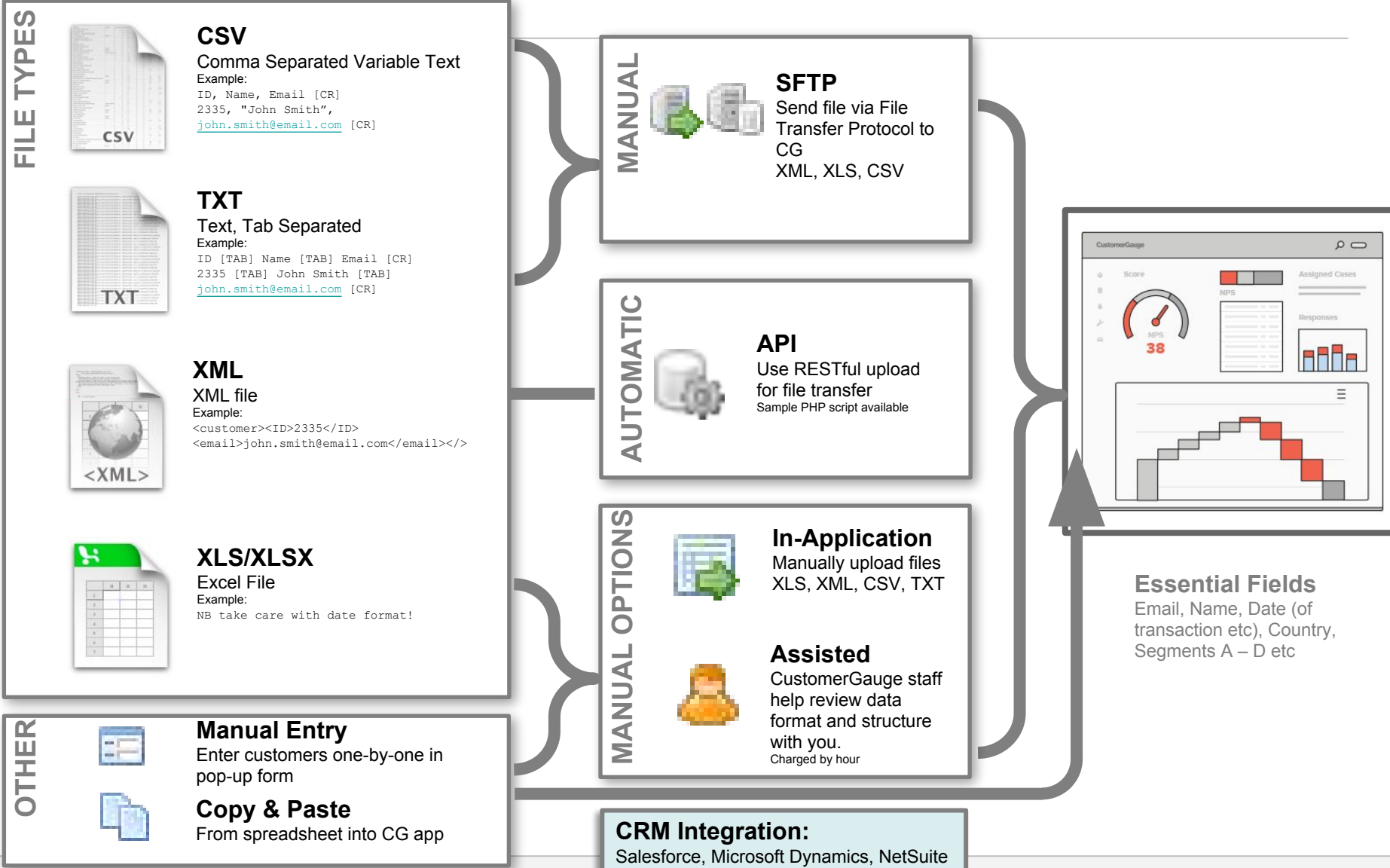
1. Data Input Options
2. Data Output Options
3. Standard Data Field List (Transaction Data)
4. Integrations
 - List of CRM Integrations available
 - Single Sign On for Salesforce
5. Relevant Documentation Links
6. Feature availability based on package
7. Data Security Procedures

THE DETAILS



CustomerGauge

Inputs into CustomerGauge



Updated TC 29 August 2016

CRM Integration:
Salesforce, Microsoft Dynamics, NetSuite etc. (14 CRM options available)

Automatic Pull or Manual pull - Select the fields to send to CG.


Outputs from CustomerGauge



Data on demand


CustomerGauge does not normally push data automatically.

MANUAL



In-Application
Manually Export files

AUTOMATIC




API
Use RESTful upload for file transfer
Sample PHP script available
<https://developers.customergauge.com/api/>


CRM Integration: Salesforce, Microsoft Dynamics, Netsuite etc. (14 CRM options available)

Automatic push back - Select the CG fields to send to your CRM based on customer response.


FILE TYPES



CSV
Comma Separated Variable Text
Example:
ID, Name, Email [CR]
2335, "John Smith",
john.smith@email.com [CR]



XLS
Excel File / Google Spreadsheet
Example:
NB take care with date format!



XML/JSON
XML file
Example:
`<customer><ID>2335</ID>
<email>john.smith@email.com</email></>`

Standard CustomerGauge fields

- Standard CustomerGauge fields Set for Transaction Data (XLS)
- <https://support.customergauge.com/helpdesk/attachments/5031989192>
- More fields available – ask for details



Customer Number	9386
Email	byron_schiffer@directness.net
Phone	1712361765
First Name	Byron
Last Name	Schiffer
Salutation	Dear Mr Schiffer
Job Position	Manager
Language	EN
Job Level	C
Company Number	
Company	
Company Revenue	
Company Revenue Cluster	
Agent Name	John Smith
Agent Email	john_smith@directness.net
Country	US
State	FL
Area	
City	
Division	
Currency	USD
NPS Format	Transactional
NPS Type	b2b
Number order	1246
Order Value	79
Order Date	2015-08-08 21:00:00
Product SKU	Default Value
Flight	Default Value
Segment A	default segment a
Segment B	default segment b
Segment C	default segment c
Segment D	default segment d
Segment E	default segment e
Segment F	default segment f
Segment G	default segment g
Segment H	default segment h
Segment I	default segment i
Segment J	default segment j

Integration

With CustomerGauge you can leverage the value you have in data

- Merge your CRM data with NPS data or add in feedback to help desk tickets.
- With our CRM integrations you can send your NPS comments and scores right back into client records - no need to train your staff on another system!
- And our **Single Sign-on for Salesforce (SSO)** options make it a breeze to go straight from your Salesforce environment to deep-dive into CustomerGauge data.

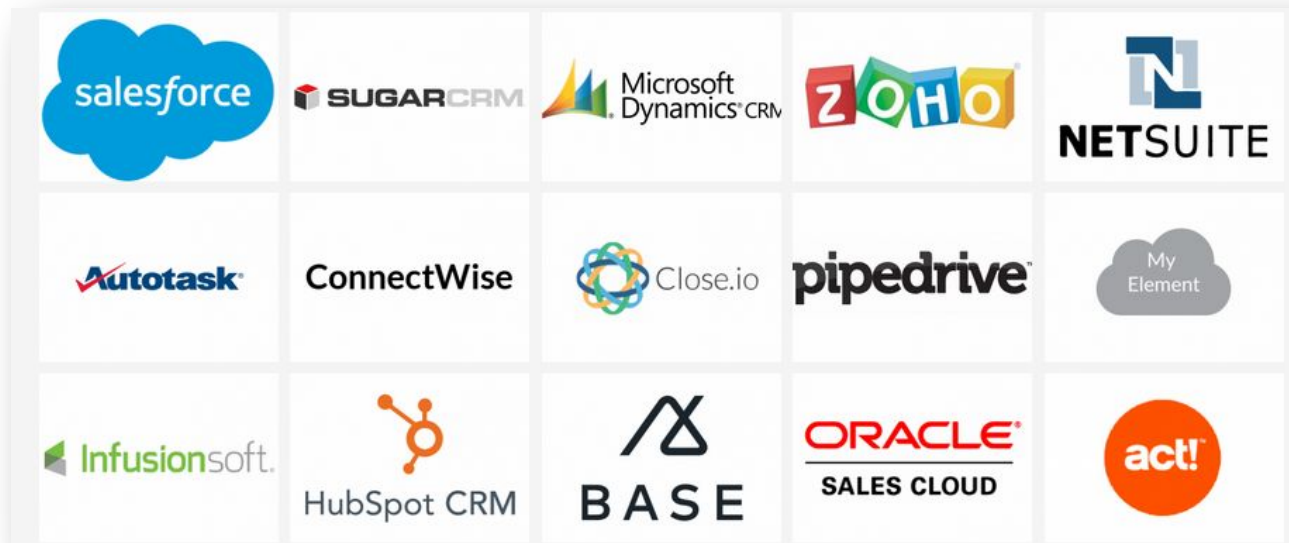
Case Detail		Edit	Delete	Close Case
Case Owner	Hannah Linnekamp [Change]			
Case Number	00001030			
Contact Name	Omar Amin			
Account Name	Dunder-Mifflin			
Type				
Case Reason				
NPS	8			
Follow-up Request	1			
Follow-up Details	+1 555 23456			
Contact Email Case	omar.dunder11@nps-fast.com			
Account Name Case	Dunder-Mifflin			
Contact ID Case	0035800000361TV			
Account ID Case	00158000003kHty			
Survey Type	Relationship			
Survey Language	EN			
Contact LastName Case	Amin			
Date/Time Opened	15-3-2016 15:08			
Product				
Potential Liability				
Created By	Hannah Linnekamp , 15-3-2016 15:08			
Subject	38			
Description				
Self-Select Reasons				
Comment	Loved the product, not too keen on the service :(
Custom Links	Up-sell / Cross-sell Opportunity			
		Edit	Delete	Close Case

CRM Integration Options – 2 way

CustomerGauge provides two-way integrations with a range of leading CRM applications.

We connect with 14 CRM's!

“More than 75% of all CustomerGauge installations have one or more integration active”



Don't find what you are looking for in the list here? Check with us!

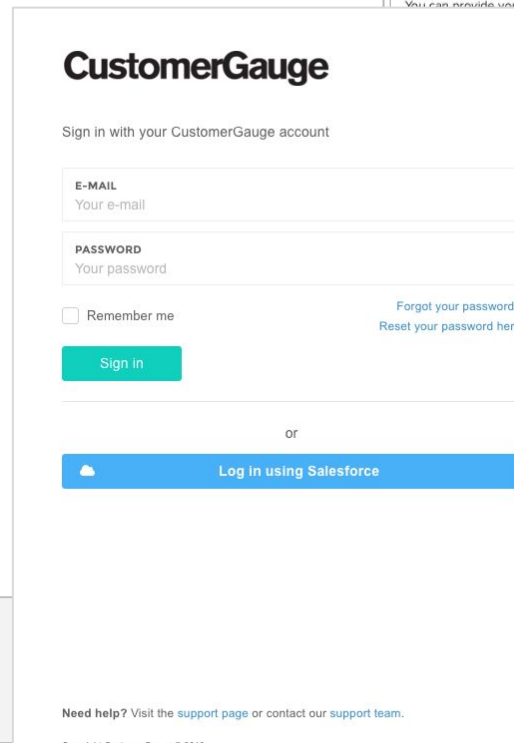
Single Sign On for Salesforce

CustomerGauge's **Single Sign-On feature (SSO)** makes it easy for clients with Salesforce™ to log into CustomerGauge using Salesforce user credentials - a “one-click” solution

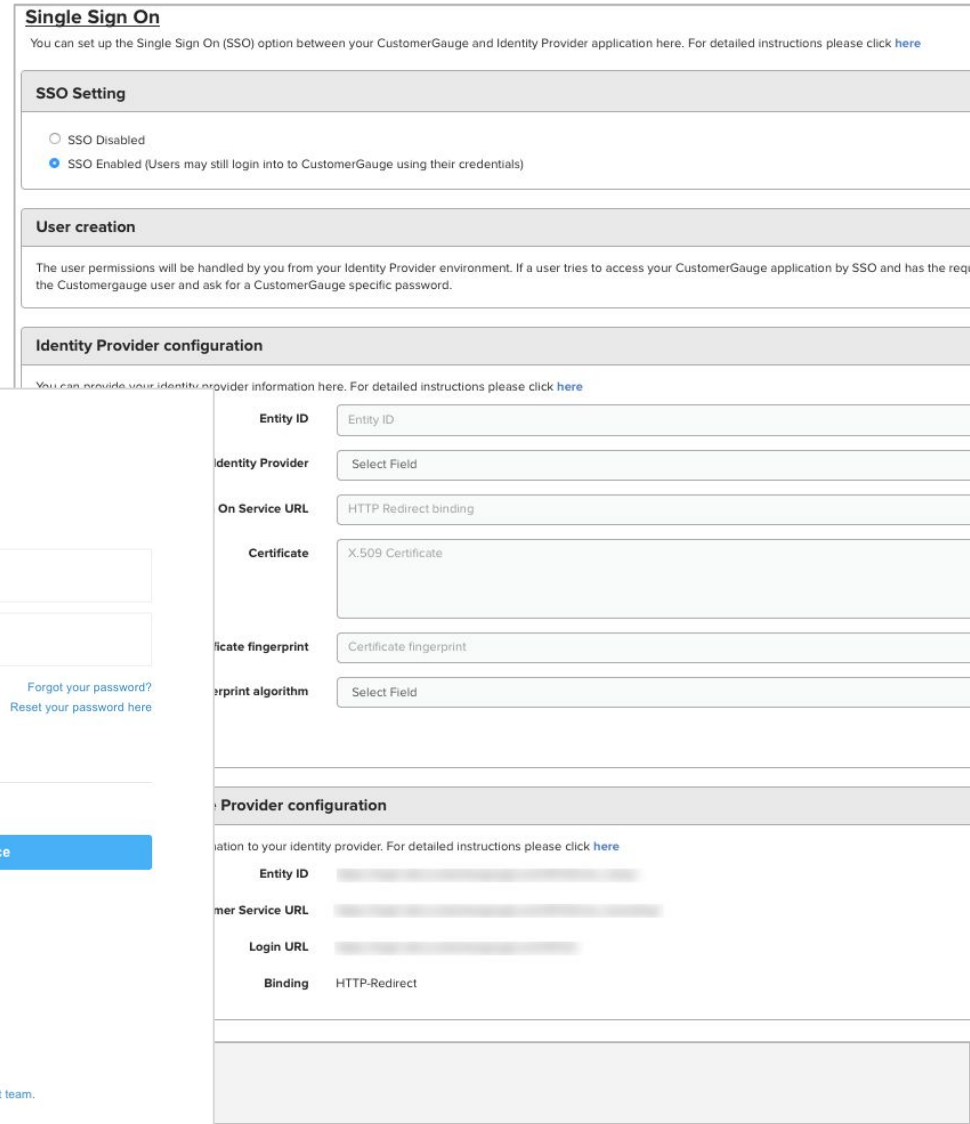
For more information:

<https://support.customer-gauge.com/support/solutions/articles/5000710180-single-sign-on-salesforce>

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The image shows the CustomerGauge login interface. At the top, the CustomerGauge logo is displayed. Below it, the text "Sign in with your CustomerGauge account" is shown. There are two input fields: "E-MAIL" with the placeholder "Your e-mail" and "PASSWORD" with the placeholder "Your password". A "Remember me" checkbox is located below the password field. To the right of the password field, there are two links: "Forgot your password?" and "Reset your password here". A green "Sign in" button is positioned below the input fields. Below the "Sign in" button, the word "or" is centered. A blue button with a Salesforce logo and the text "Log in using Salesforce" is located below "or". At the bottom of the page, there is a link: "Need help? Visit the support page or contact our support team."



The image shows the "Single Sign On" configuration page. The title is "Single Sign On" and the subtitle is "You can set up the Single Sign On (SSO) option between your CustomerGauge and Identity Provider application here. For detailed instructions please click here". The page is divided into three main sections: "SSO Setting", "User creation", and "Identity Provider configuration".

- SSO Setting:** Contains two radio buttons. "SSO Disabled" is unselected, and "SSO Enabled (Users may still login into to CustomerGauge using their credentials)" is selected.
- User creation:** Contains the text: "The user permissions will be handled by you from your Identity Provider environment. If a user tries to access your CustomerGauge application by SSO and has the required permissions, the system will create the CustomerGauge user and ask for a CustomerGauge specific password."
- Identity Provider configuration:** Contains the text: "You can provide your identity provider information here. For detailed instructions please click here". Below this text are several input fields:
 - Entity ID: Entity ID
 - Identity Provider: Select Field
 - On Service URL: HTTP Redirect binding
 - Certificate: X.509 Certificate
 - Certificate fingerprint: Certificate fingerprint
 - Fingerprint algorithm: Select Field

Below the "Identity Provider configuration" section, there is another section titled "Provider configuration" with the text: "You can provide your identity provider information here. For detailed instructions please click here". Below this text are several input fields:

- Entity ID: [Redacted]
- On Service URL: [Redacted]
- Login URL: [Redacted]
- Binding: HTTP-Redirect

Relevant Links

What Data should you upload?

- <https://support.customergauge.com/support/solutions/articles/5000617657-which-data-should-i-upload->

SFTP:

- <https://support.customergauge.com/support/solutions/articles/5000581185-sftp-file-upload-system>
- <https://support.customergauge.com/support/solutions/articles/5000581201-how-to-connect-to-the-sftp-server>

In-Application Upload (Transaction Data):

- <https://support.customergauge.com/support/solutions/articles/5000581165-import-data-transactional-data>

API Documentation:

- <https://developers.customergauge.com/api-4-0/>

CRM Integrations:

- <https://support.customergauge.com/support/solutions/folders/5000279525>

Single Sign On for Salesforce (SSO):

<https://support.customergauge.com/support/solutions/articles/5000710180-single-sign-on-salesforce->

[e-](#)

Relevant Links - API

API Input Data Options:

File Post: <https://developers.customergauge.com/api/file/transactional/post-transactional/>

Stream Post: <https://developers.customergauge.com/api/stream/transactional/post-transactional/>

Single Transaction Post: <https://developers.customergauge.com/api/transactions/mailqueue/post-mailqueue/>

API Output Data Options:

Get Responses: <https://developers.customergauge.com/api/transactions/response/get-response/>

*For full list of API Call options please visit our API documentation site -
<https://developers.customergauge.com/api-4-0/>*

Feature availability based on package

	Business	Enterprise
SFTP	\$	\$
In-Application Upload	✓	✓
API	✓	✓
CRM	\$	\$

- Included in base package. No extra charge.
- \$ Add-on Option. Additional Charge will apply.

Security & Privacy

Data Security Procedures:

We have strong procedures in place to ensure client data security.

<https://support.customergauge.com/support/solutions/articles/5000581220-data-security-procedures>

HIPAA:

<https://support.customergauge.com/support/solutions/articles/5000693409-hipaa-compliance>

More information?

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