Hubcase for Microsoft Dynamics CRM

Installation and Configuration Guide

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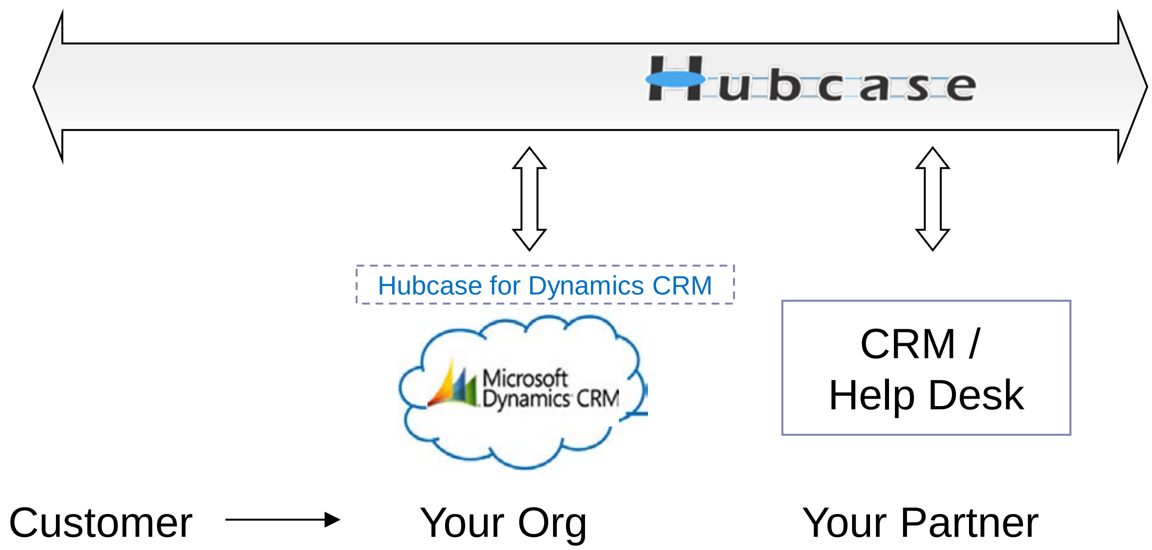
If you have any questions, please email support@hubcase.com

Note: this document is intended for system administrator, and not for end users.

1. Overview

“Hubcase for Dynamics CRM” is a Microsoft Dynamics CRM Marketplace app or solution that adds B2B escalation capability to your support cases under your Dynamics CRM account.

Specifically, the solution adds a “B2B” sub-list on your Cases form if permitted by user role, and the sublist serves as the user interface to facilitate B2B communication via Hubcase. It does not replace or alter any of your existing Dynamics CRM behavior.



As illustrated above. Hubcase allows your CRM instance to interact with a partner’s system to escalate support cases to each other.

In other word, “Hubcase for Dynamics CRM” solution is a plug-in or adapter that connects your Dynamics CRM to Hubcase. This Guide helps you accomplish both:

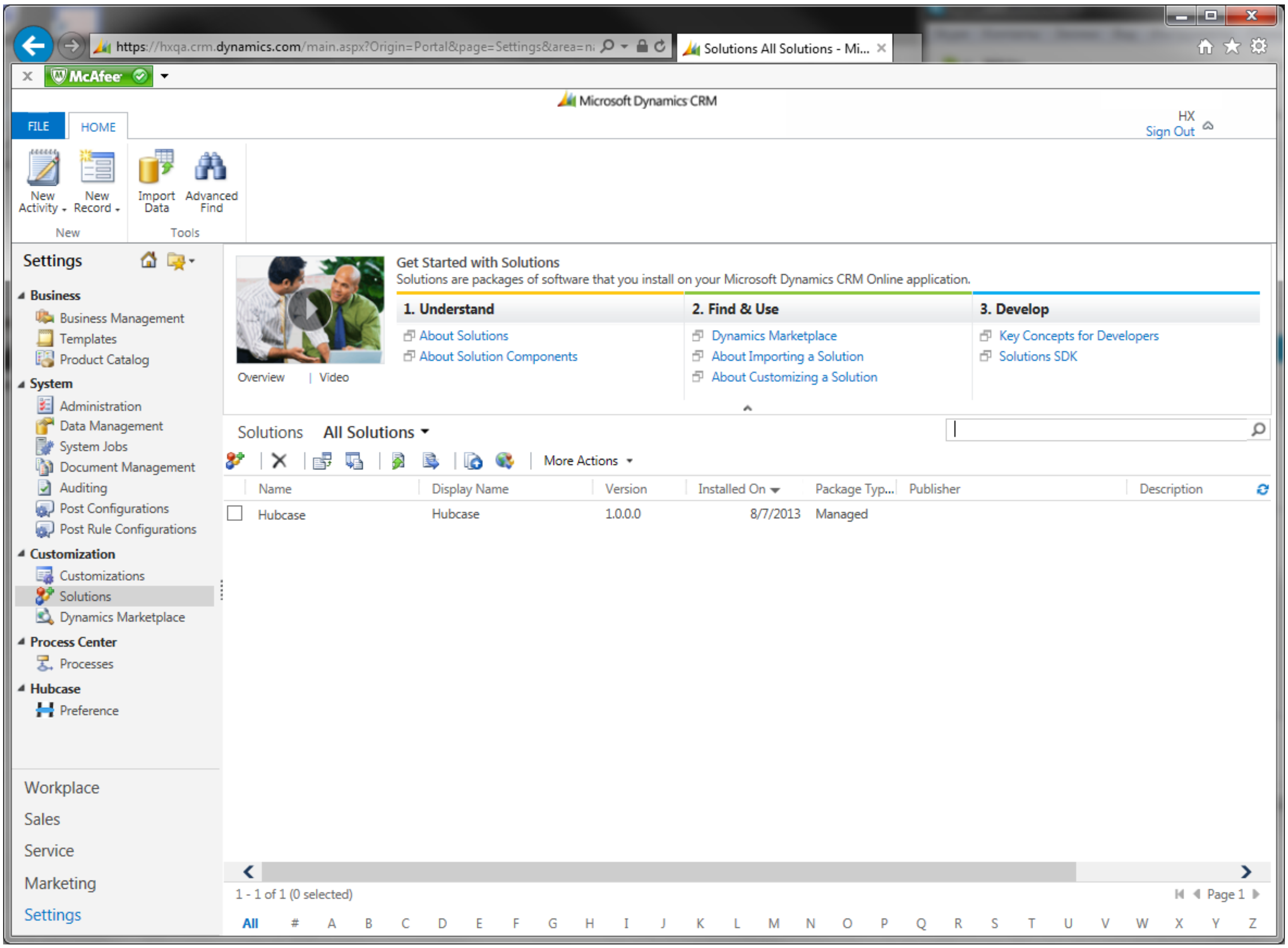
- Install and configure Hubcase for Dynamics CRM (the solution, plug-in, bundle or adapter)
- Setup Hubcase membership for your organization, and configure interaction with the plug-in

Please note that the installation and configuration only need to be done once by administrator, and only occasional maintenance is needed. Additional information can be found at http://www.hubcase.com/exchange_dynamics_crm.html

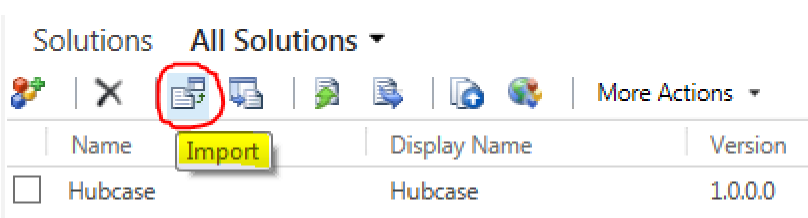
2. Install "Hubcase for Dynamics CRM" solution

Login your Microsoft Dynamics CRM account as Administrator.

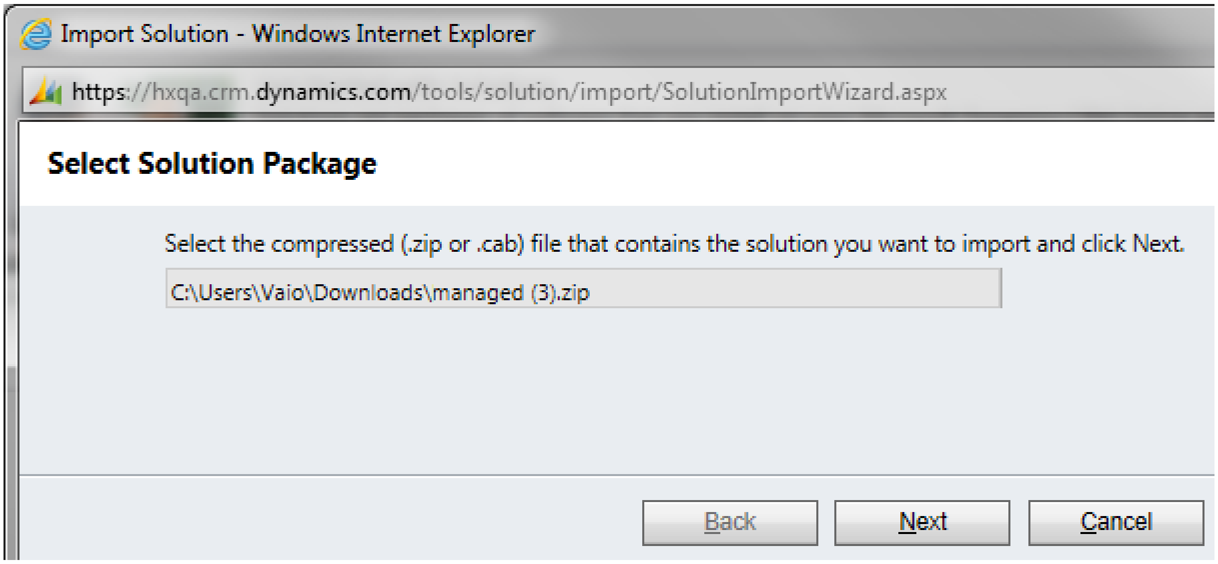
- Navigate to Settings > Solutions



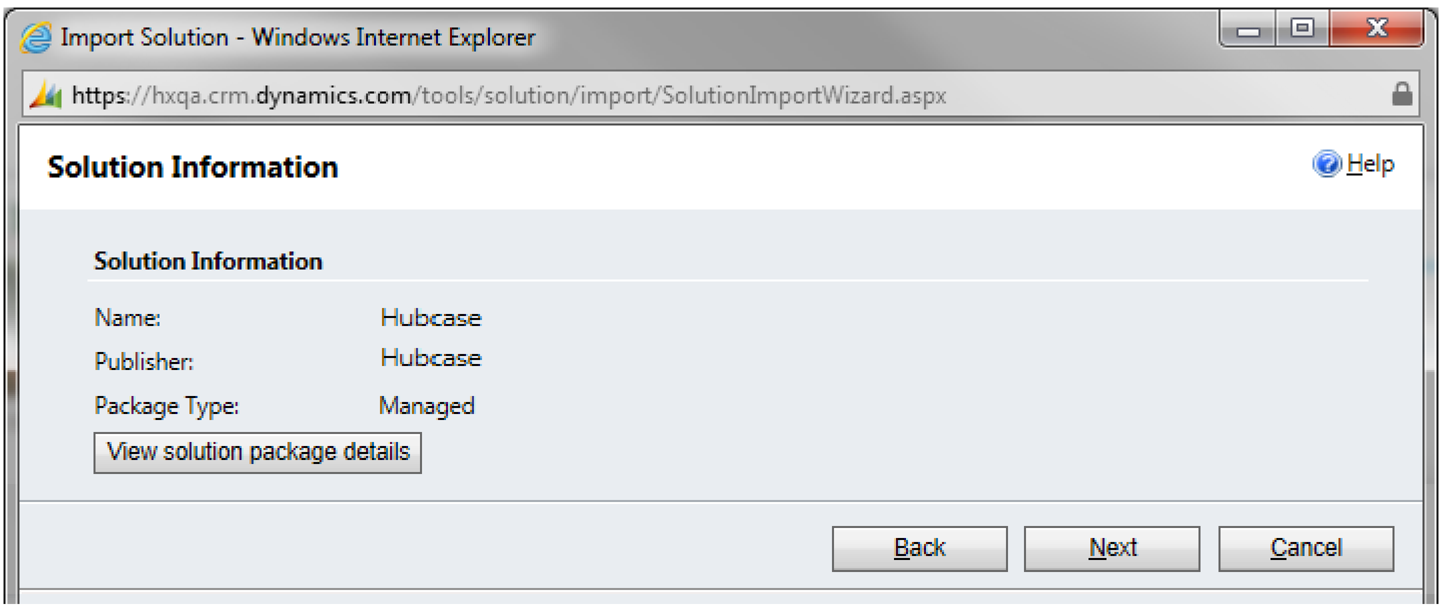
Click Import Solution on Solutions view toolbar



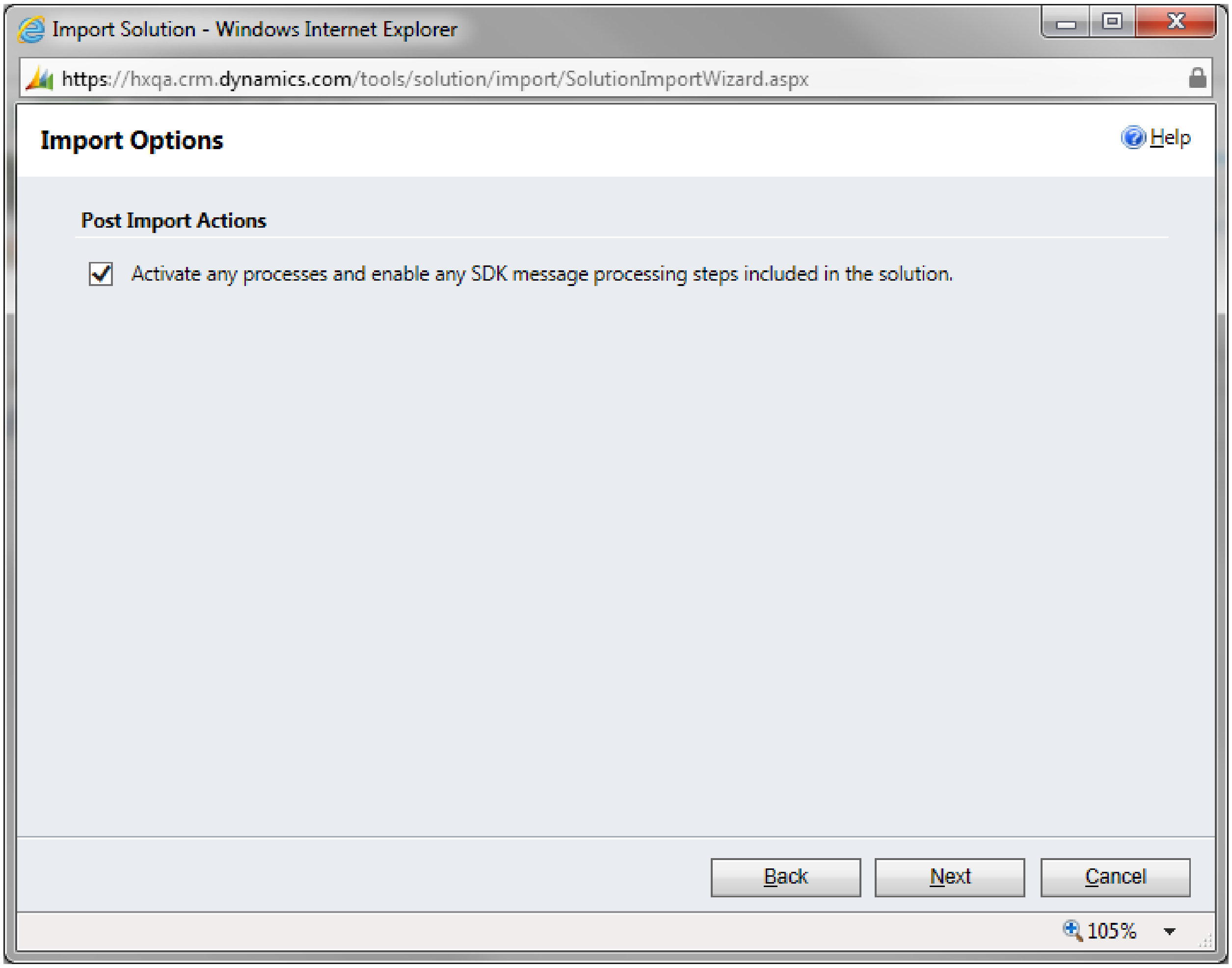
Select Hubcase Solution Package provided for you in a zip file



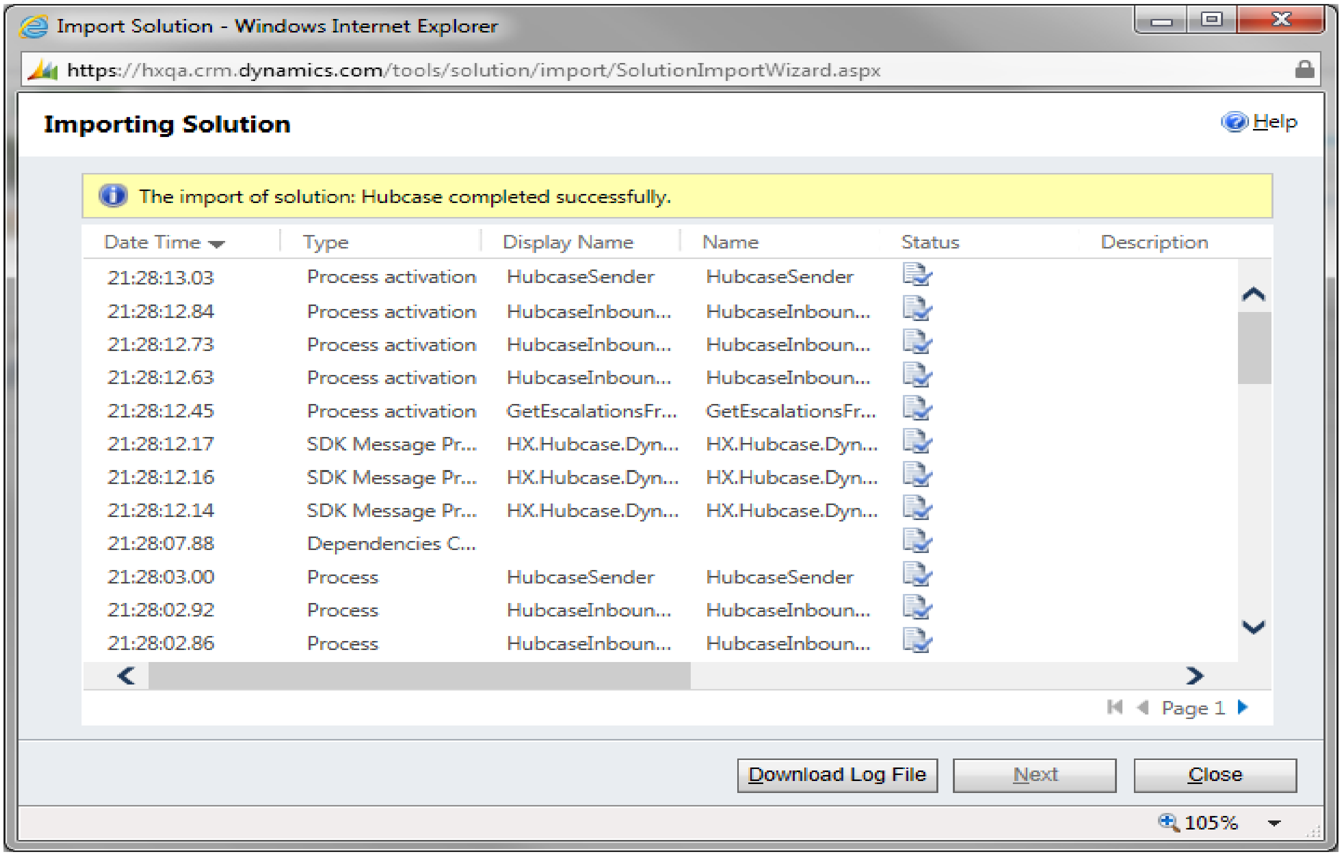
Click Next



Click on Next



Check the checkbox, and clikc next and wait.



Import completed.

You have completed the Solution package installation!

It's a good idea to keep your Dynamics CRM window / tab open while doing the remaining steps as you will need to reference information from Dynamics CRM.

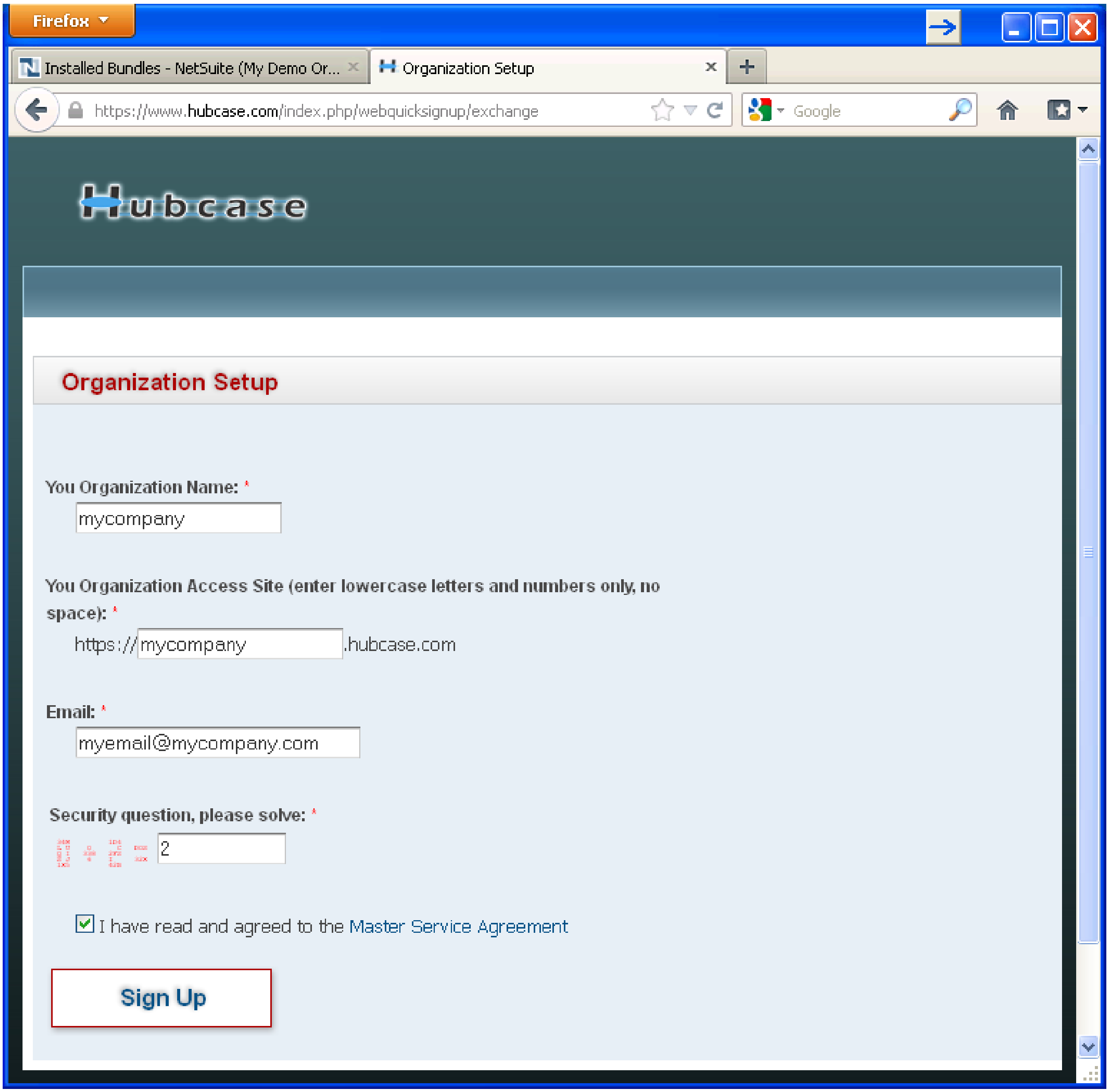
3. Setup and configure your Hubcase membership

3.1. Sign up and activate Hubcase membership for you organization

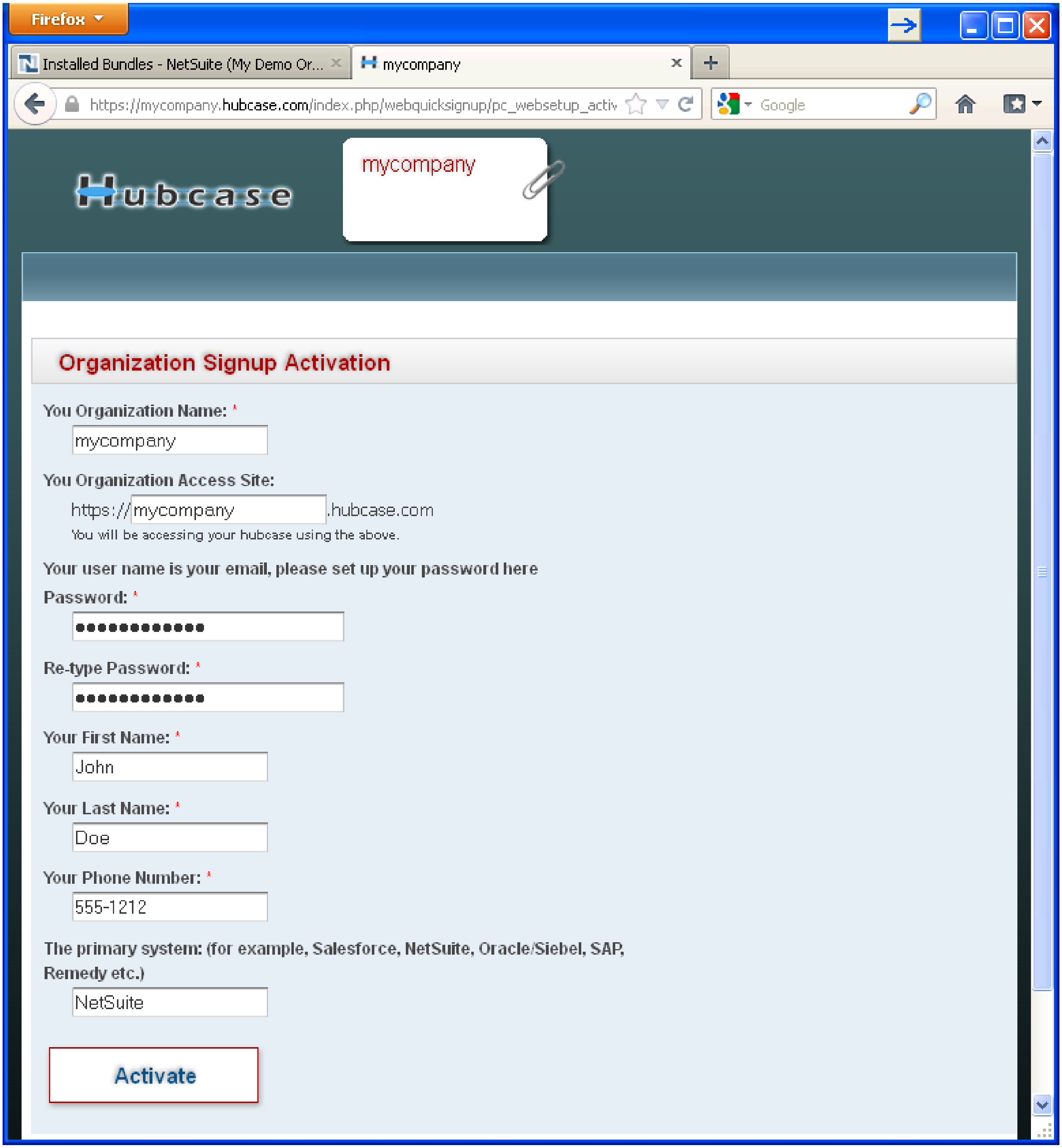
To setup your Hubcase membership for your organization, open a new browser tab / window and point to:

https://www.hubcase.com/index.php/webquicksignup/exchange

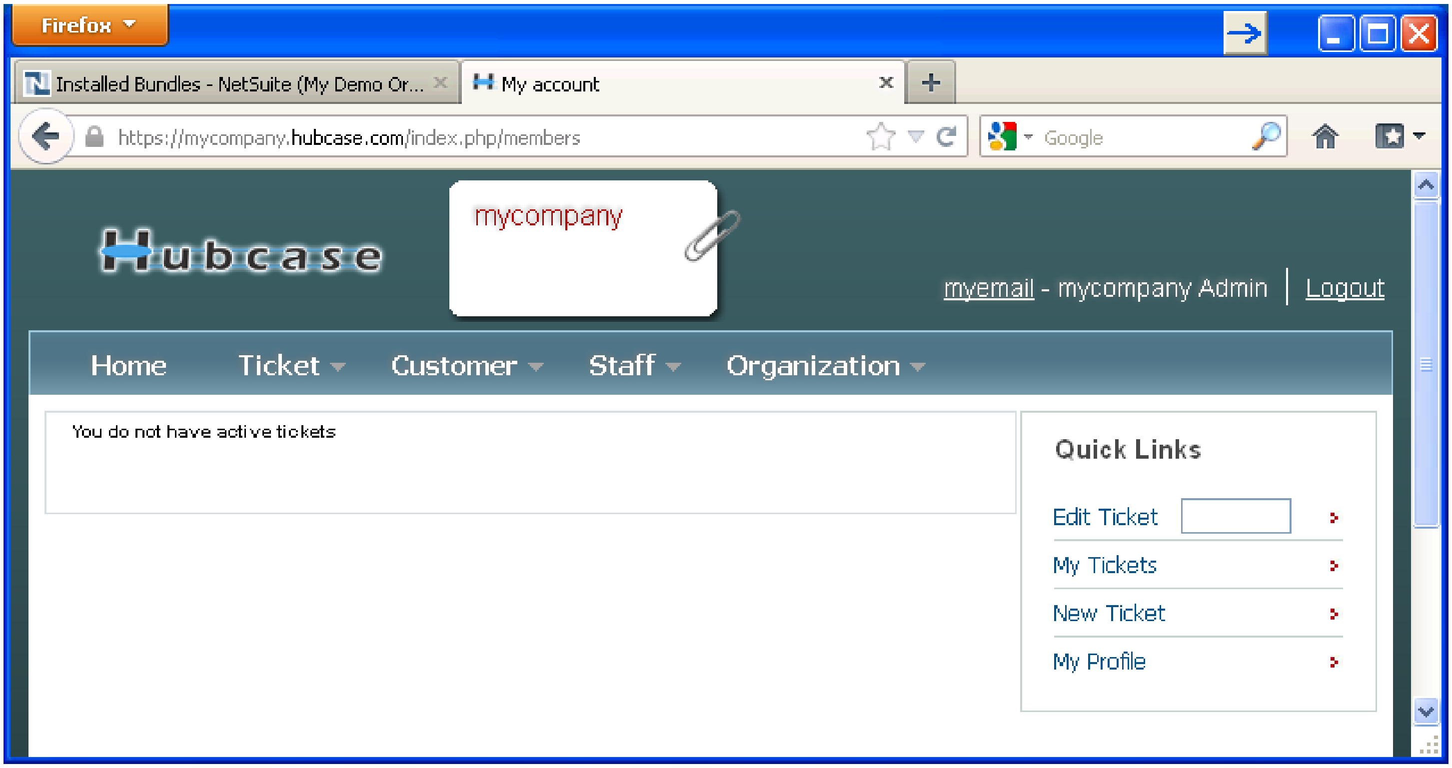
Please enter appropriate information for your company to create a Hubcase account:



You will receive an activation email after clicking “Sign Up”. Please follow the link provided in the email to activate your account.



Upon “Activate”, you will be logged in to the Hubcase portal as admin.

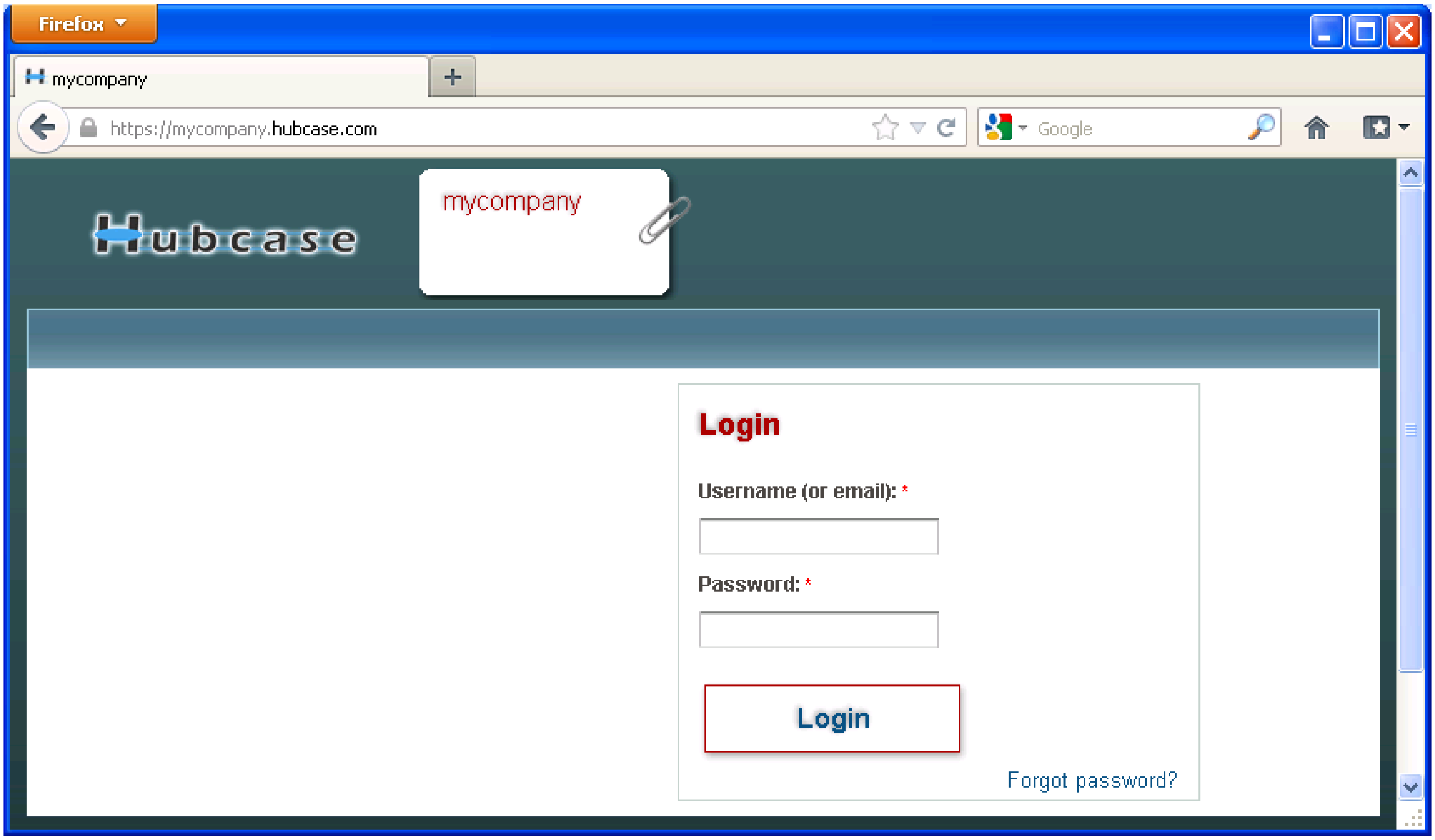


And the sign up and activation for Hubcase membership is now complete.

3.2. Login to your Hubcase portal account

Each organization has its own unique URL to login, if you set up your org as “mycompany”, your login URL should be:

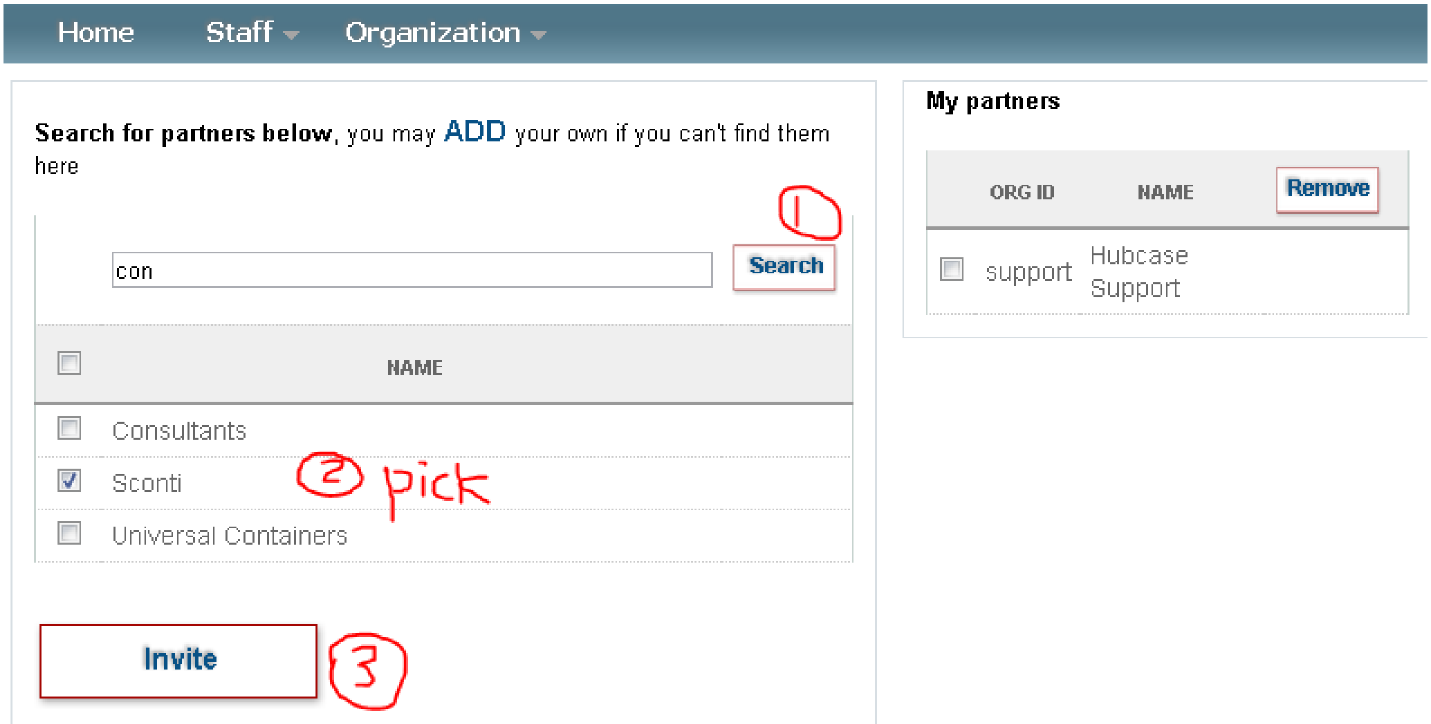
- https://**mycompany**.hubcase.com
- Username is your email address



Contact support@hubcase.com if you any problems.

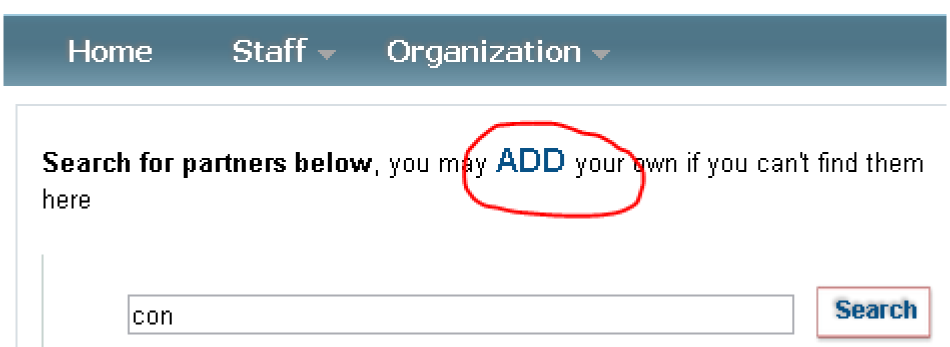
3.3. Setup B2B escalation partners

To setup your B2B escalation partners, you need to login to your Hubcase portal first, and navigate to "Organization > Partners" form as shown below:



Type at least 2 characters in the NAME field to Search the partner you are looking for. If your partner is already in the system, you can simply check the box and click on "Invite". Please at least add "NS Partner5" as your partners for test purpose. The invited partner must also accept your invitation before it appears under your "My partners" list. Make sure to confirm that under "Organization > Partners" menu.

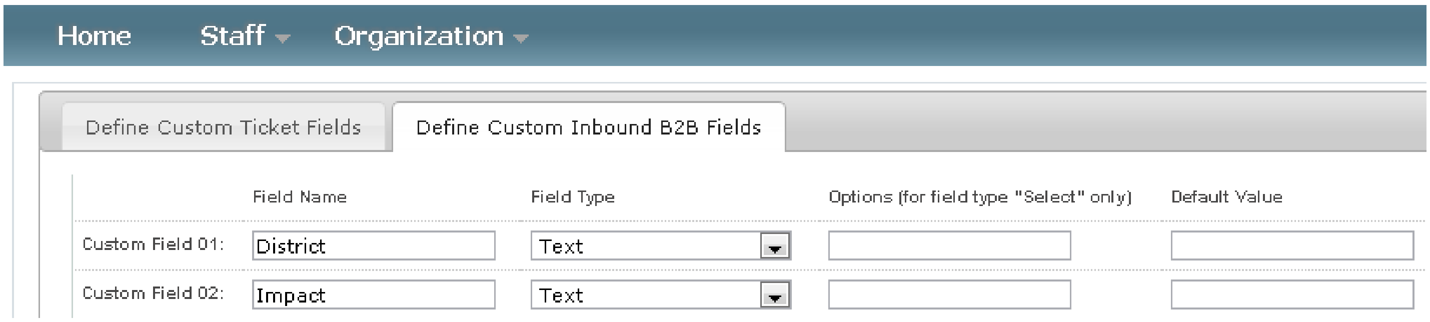
If your partner is not yet a member of Hubcase, you can "ADD" them as seen in the screenshot. What will happen is, the partner contact will get an email notification and optionally activate the partner's Hubcase membership account.



3.4. Configure Custom Fields

As a member of Hubcase, you can define up to 20 custom ticket fields and 20 B2B fields. The B2B custom fields will be presented to your partners when they need to escalate a case to your organization. Conversely, when you need to escalate a case to one of your partners, the partner's custom fields will be presented for you to populate. Therefore, each partner will define its B2B custom fields for inbound escalation cases.

Navigate to Organization > Custom Fields and select the "Define Custom Inbound B2B Fields" to define or update your inbound B2B custom fields.



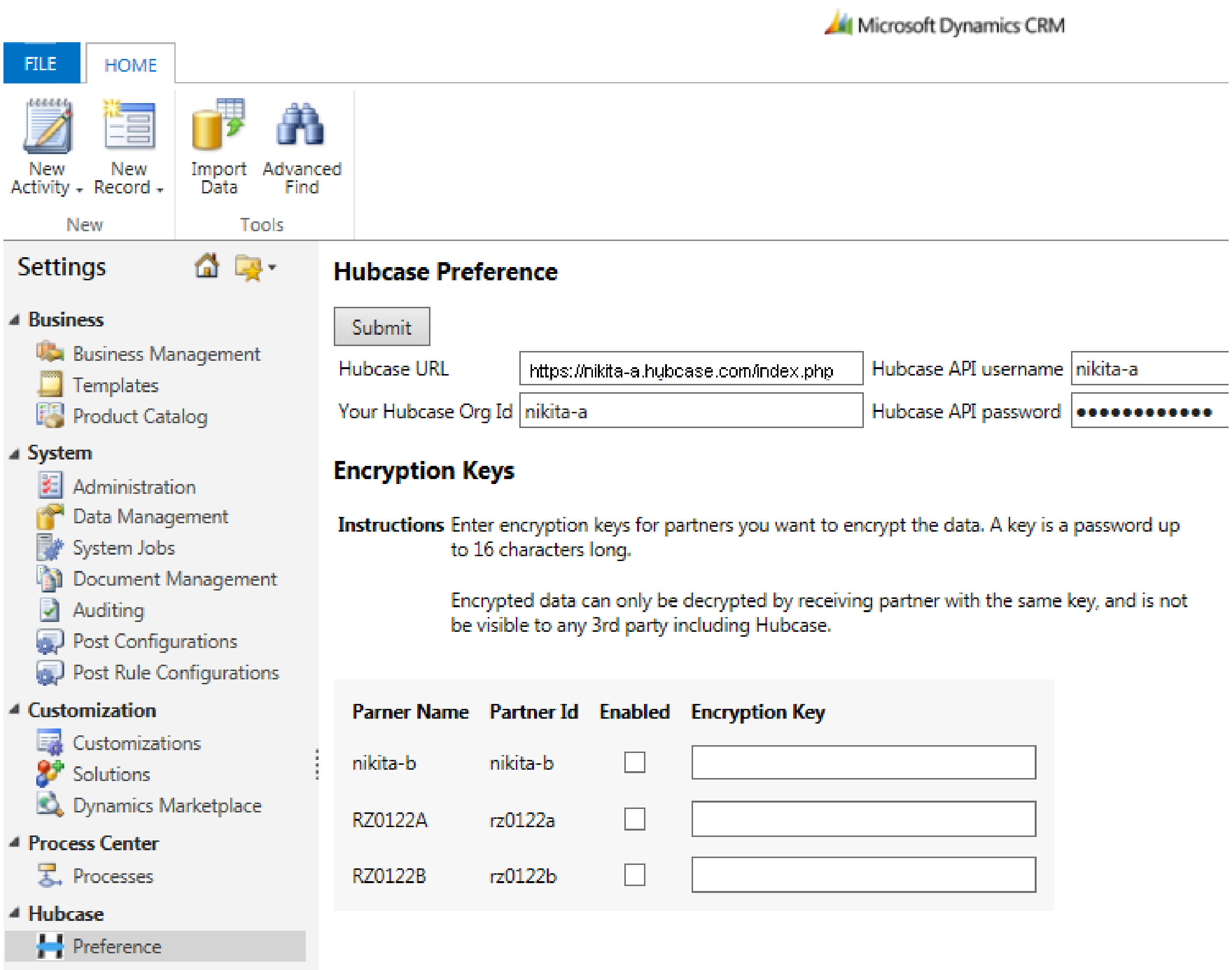
A custom field defined as Field Type "Select" should enter "Options" in pipe delimited format.

Note that anything after the first blank field definition is ignored.

4. Configure “Hubcase Preference” in Dynamics CRM

You have installed “Hubcase for Dynamics CRM” solution package, and setup your Hubcase membership, this step is to establish the link between the two.

Login to your Dynamics CRM account, and navigate to Setting > Hubcase > Preference



Enter your Hubcase access information as described in “3.2. Login to your Hubcase portal account”

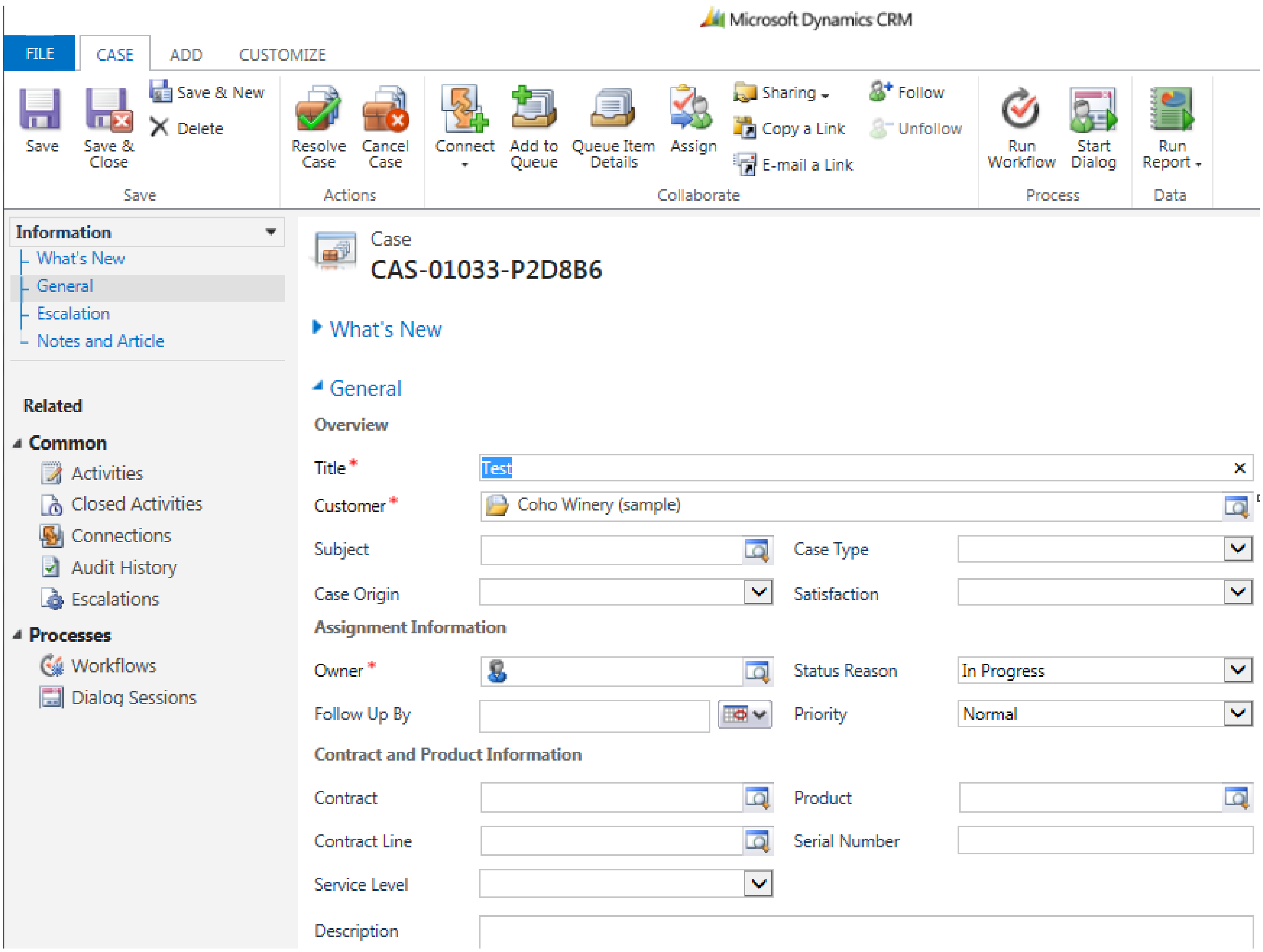
After entering your correct credential for Hubcase, you will be prompted to enter encryption keys for the partners you want to have the data exchange encrypted. Follow the instructions on the screen.

5. Testing your first B2B escalation

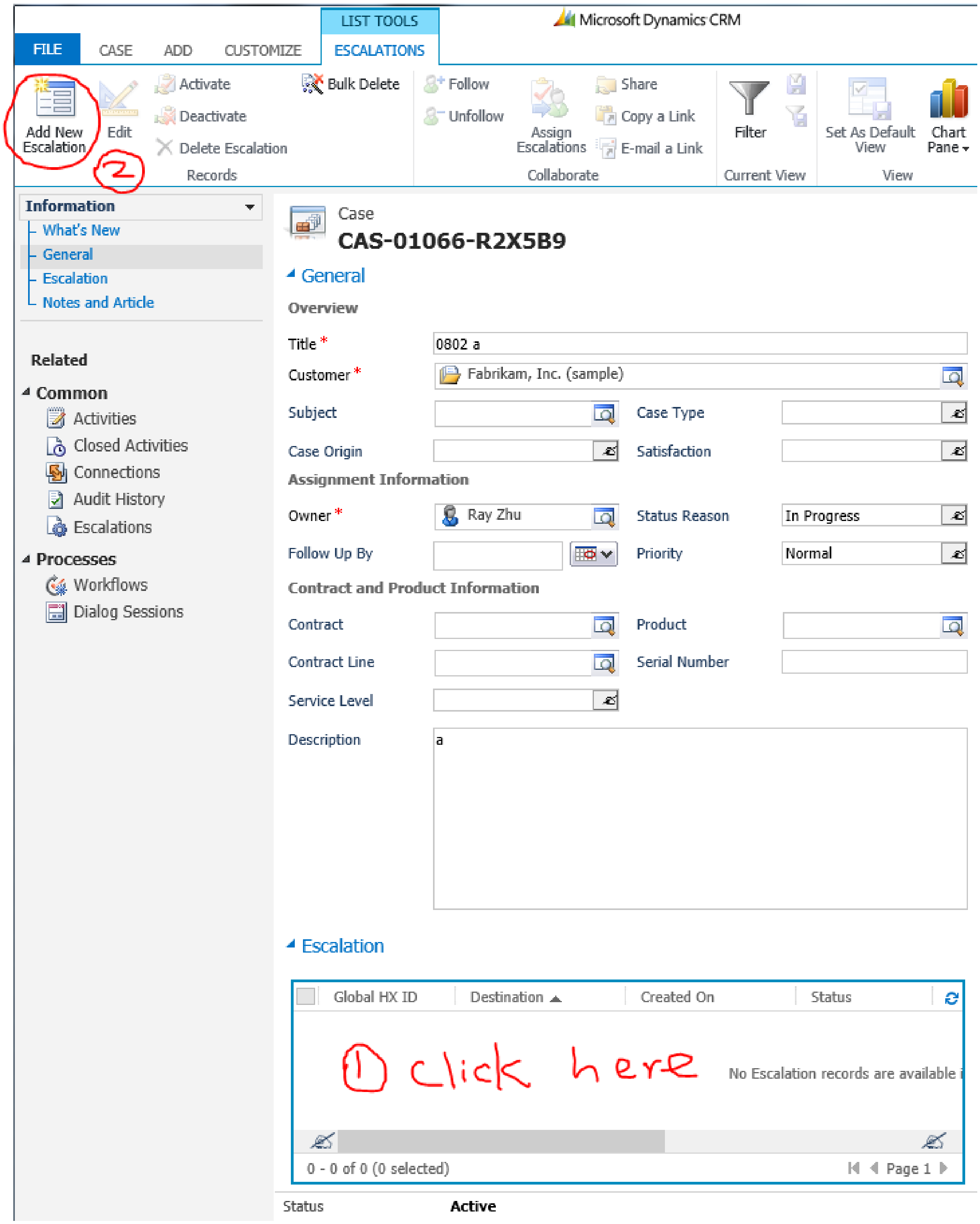
As a validation of your installation, setup and configuration, we will have a test case and escalate it to a partner organization “ns-partner5”.

Make sure to confirm that “ns-partner5” accepted your invitation. If it shows up under “Organization > Partners” menu, it has accepted.

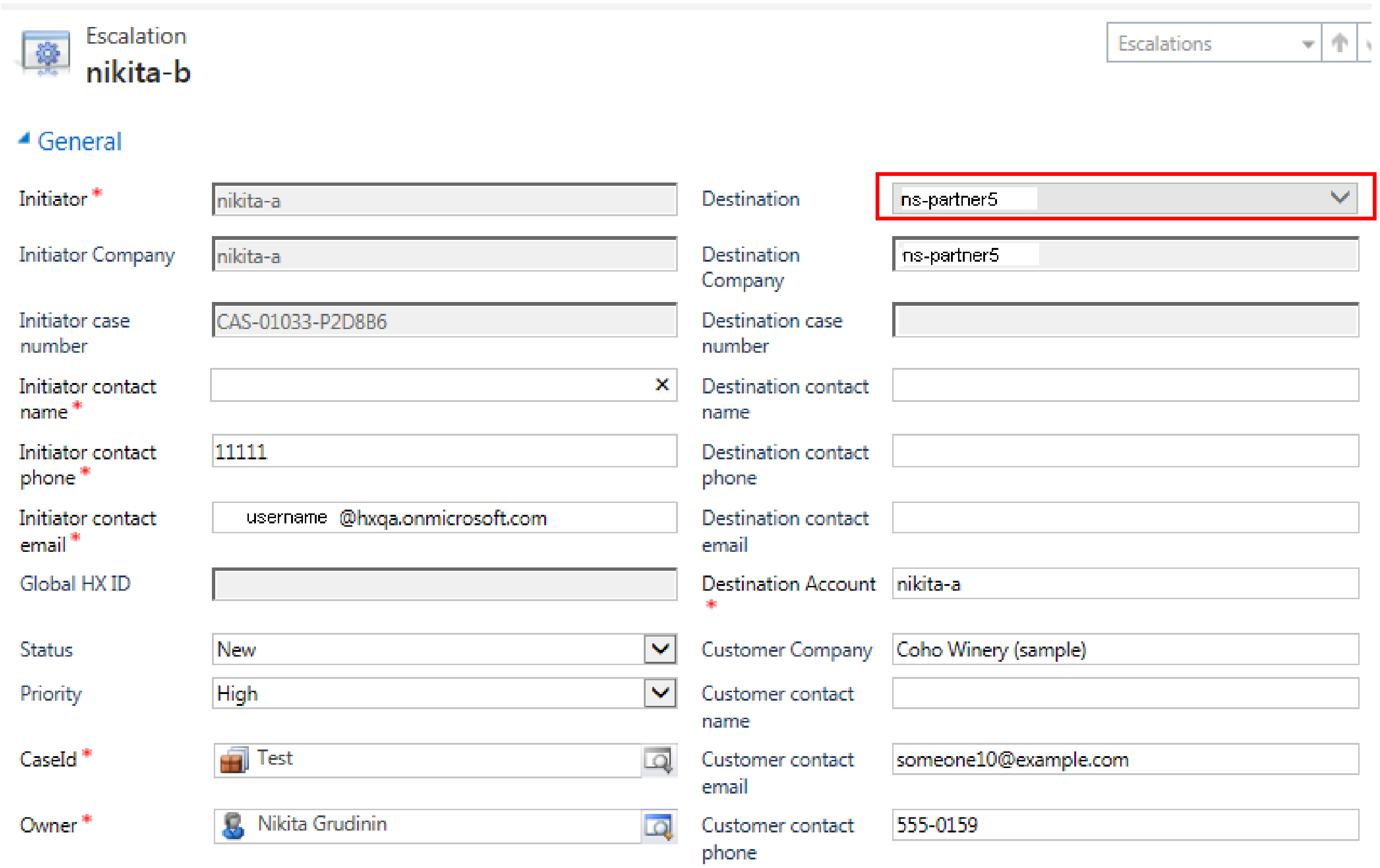
Create a test case, and save.



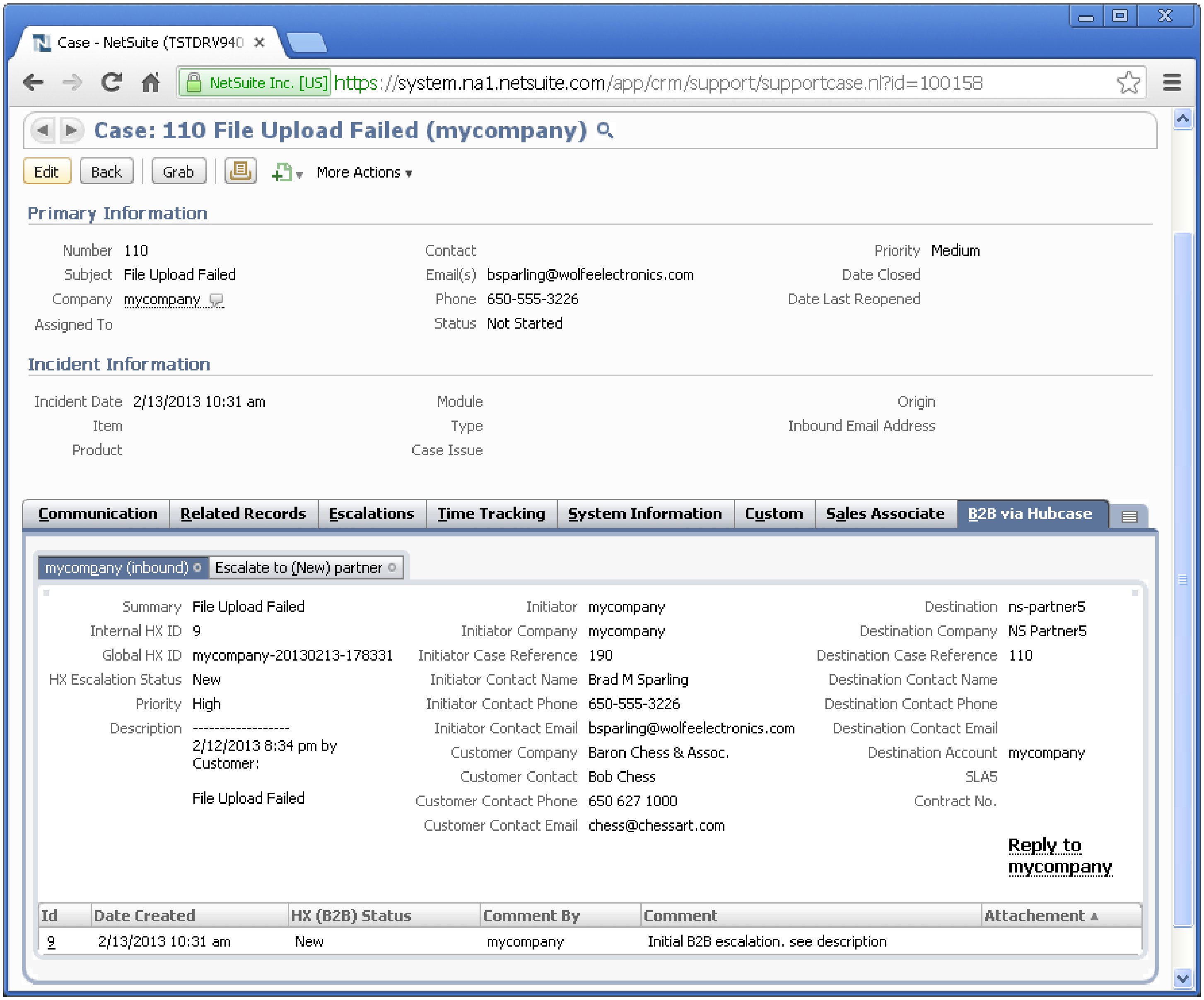
Once saved, a “Escalation” sub-list will appear under the case. Click on the Escalation sub-list, and then “Add New Escalation” button



Select ns-partner5 for the “B2B Destination Partner” field, and populate necessary information as shown below, and then “Submit”.



And, for your information, ns-partner5 has received an inbound support case as shown below because of your test escalation



Congratulations! You have completed your installation and configuration of Hubcase for Dynamics CRM.

If you have any questions, please email support@hubcase.com