



Hubcase for Microsoft Dynamics CRM Installation and Configuration Guide

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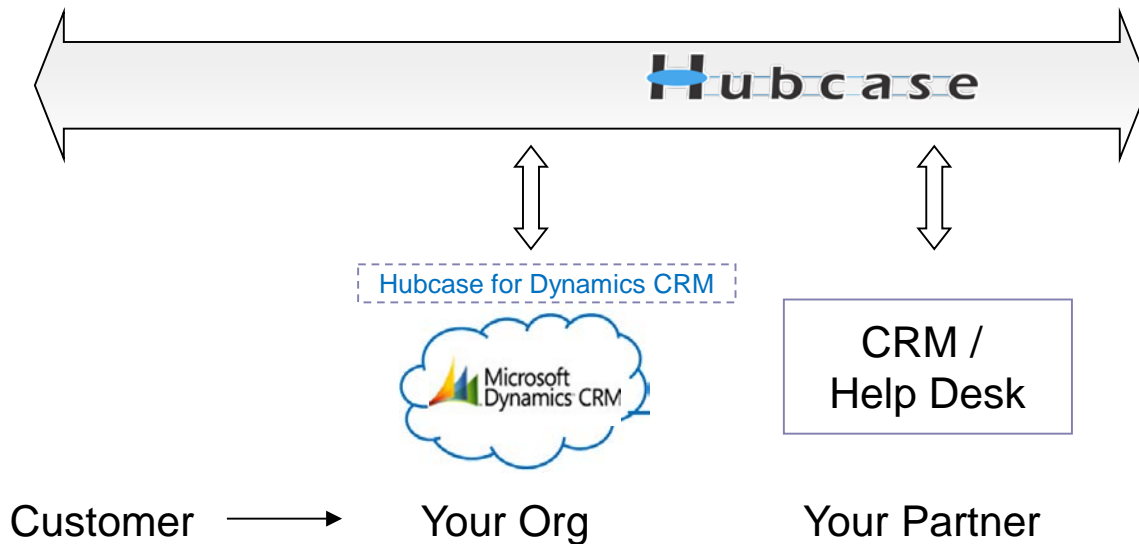
If you have any questions, please email support@hubcase.com

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

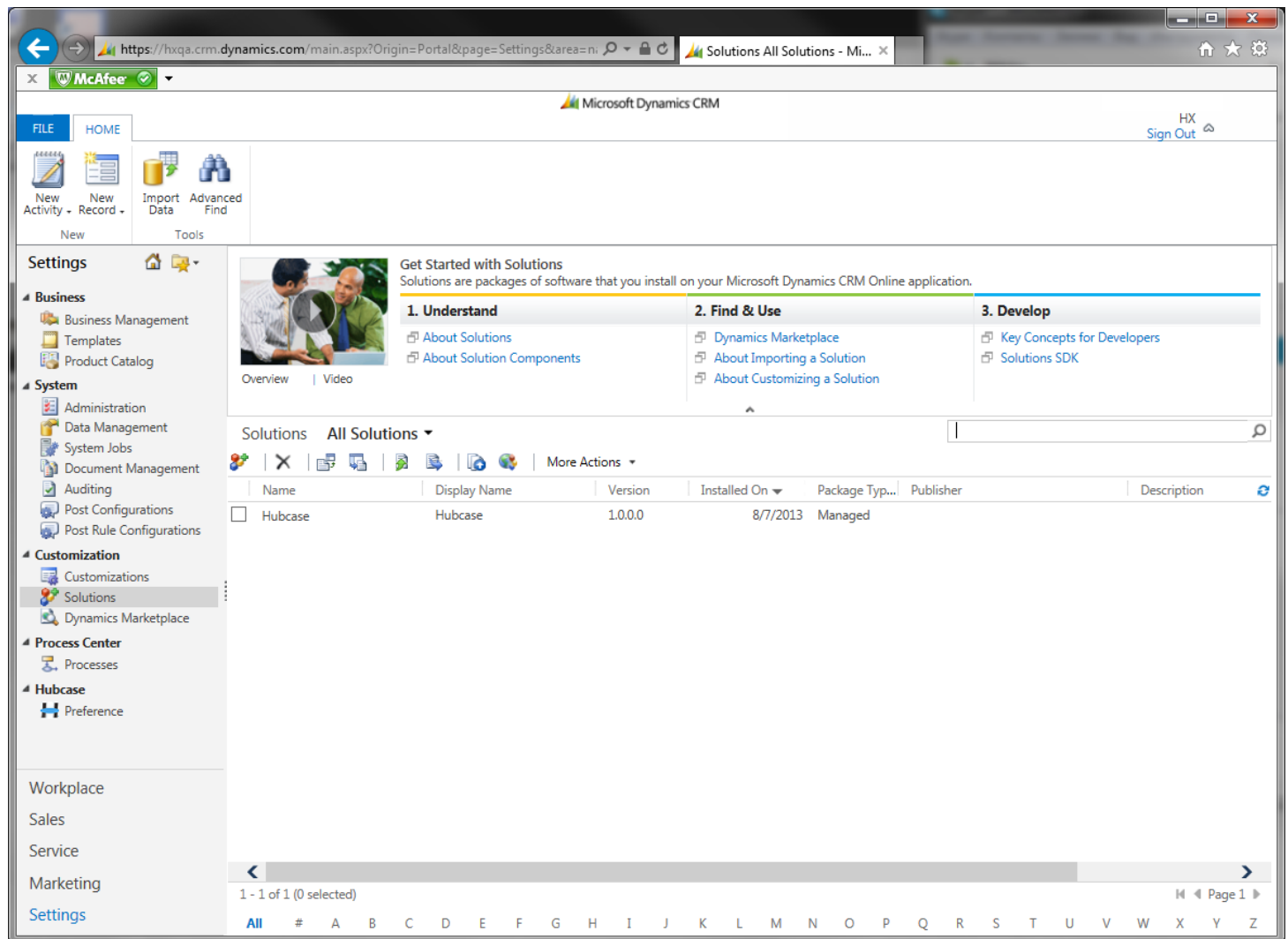
Please note that the installation and configuration only need to be done once by administrator, and only occasional maintenance is needed. Additional information can be found at

http://www.hubcase.com/exchange_dynamics_crm.html

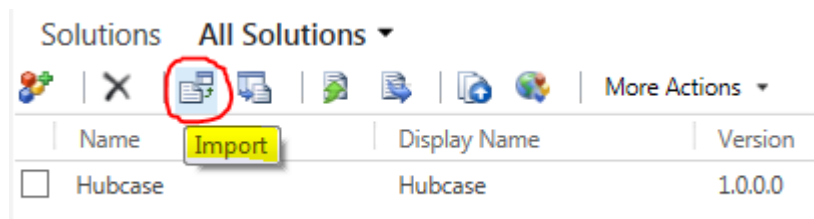
2. Install “Hubcase for Dynamics CRM” solution

Login your Microsoft Dynamics CRM account as Administrator.

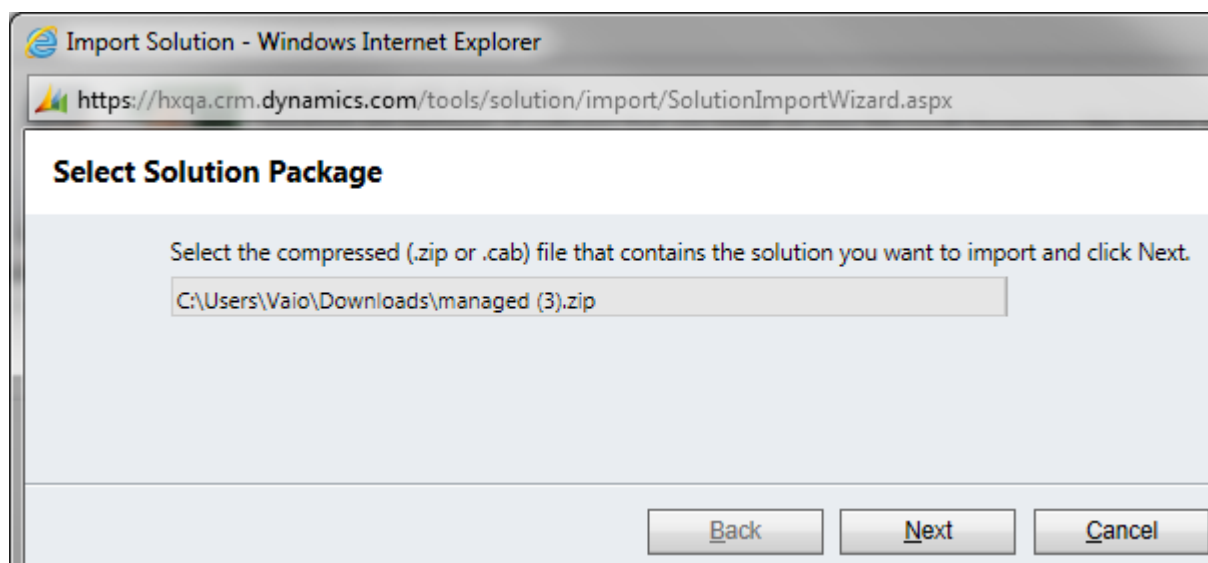
- Navigate to Settings > Solutions



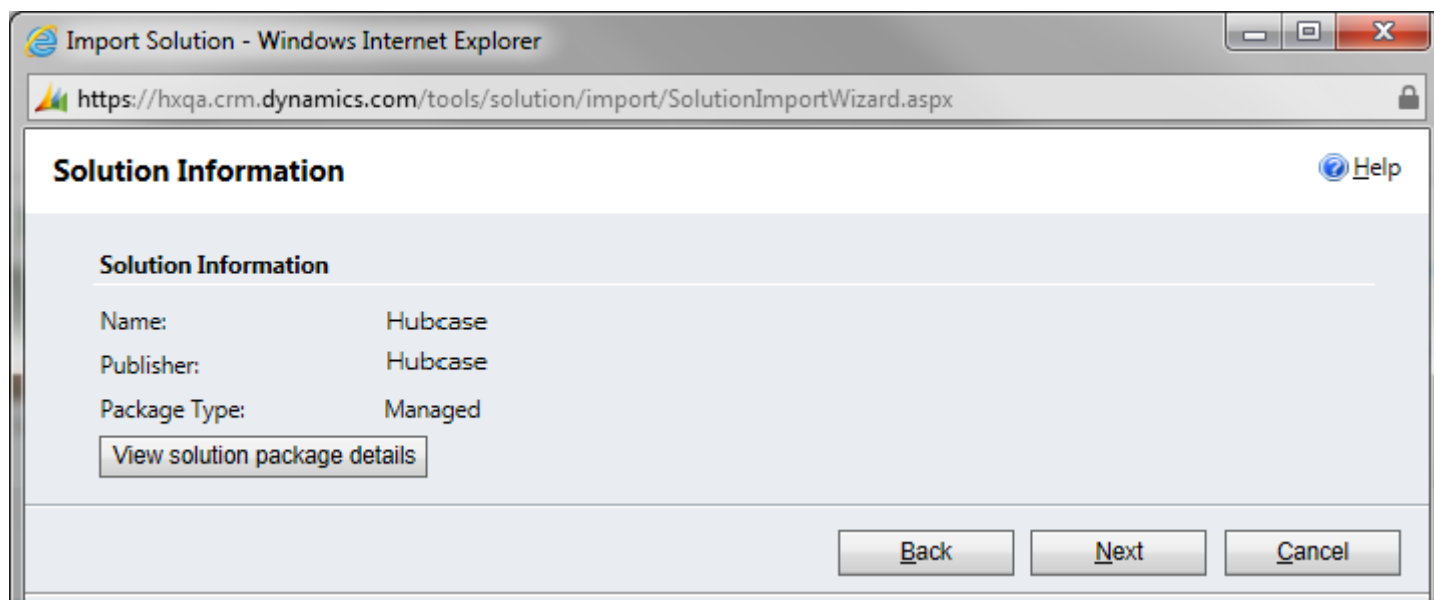
Click Import Solution on Solutions view toolbar



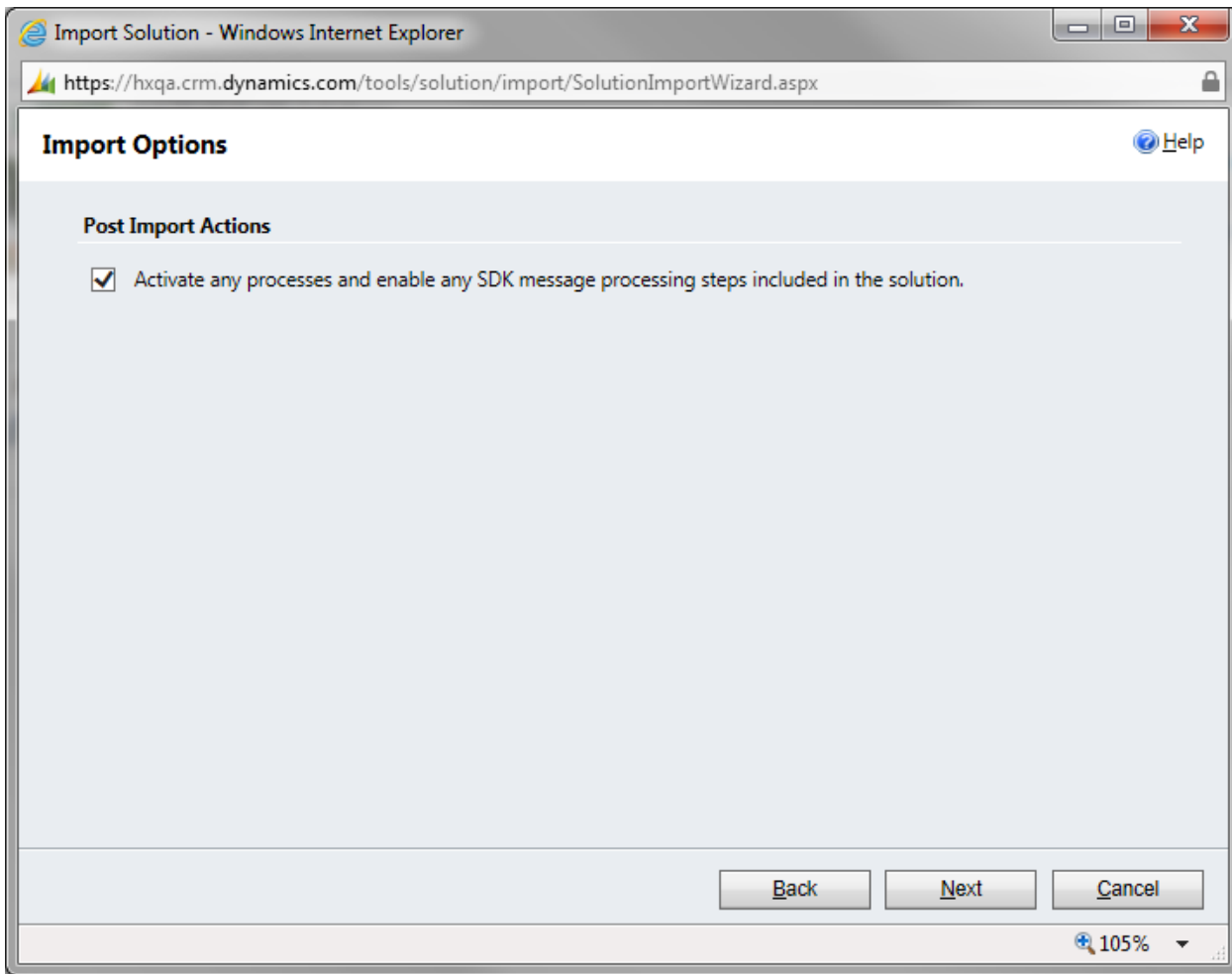
Select Hubcase Solution Package provided for you in a zip file



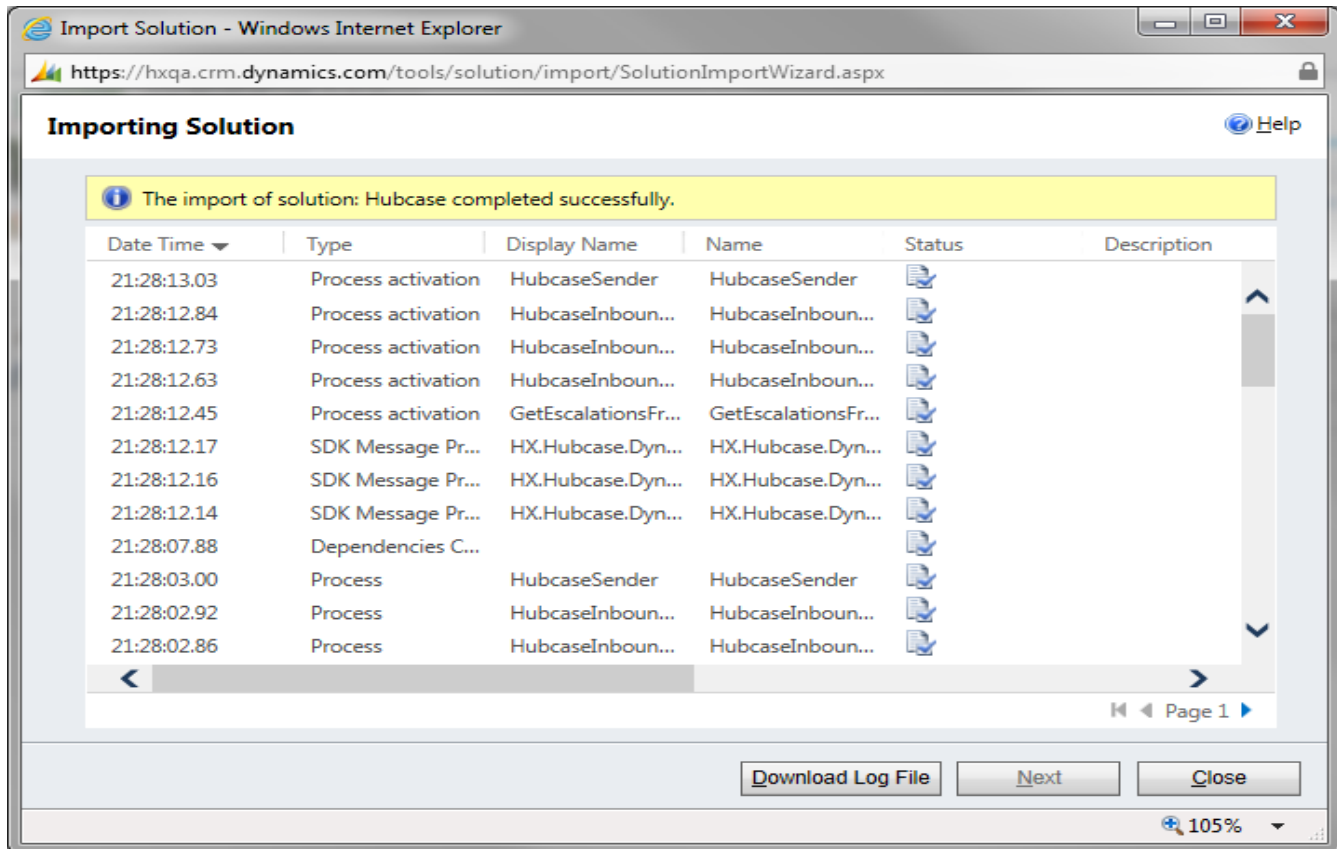
Click Next



Click on Next



Check the checkbox, and click 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:

Firefox

Installed Bundles - NetSuite (My Demo Or... x Organization Setup x +

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

Google

Hubcase

Organization Setup

You Organization Name: *

You Organization Access Site (enter lowercase letters and numbers only, no space): *

Email: *

Security question, please solve: *

200	0	100	1000
1000	100	1000	1000
100	100	100	100

I have read and agreed to the Master Service Agreement

Sign Up

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

The screenshot shows a Firefox browser window with the following details:

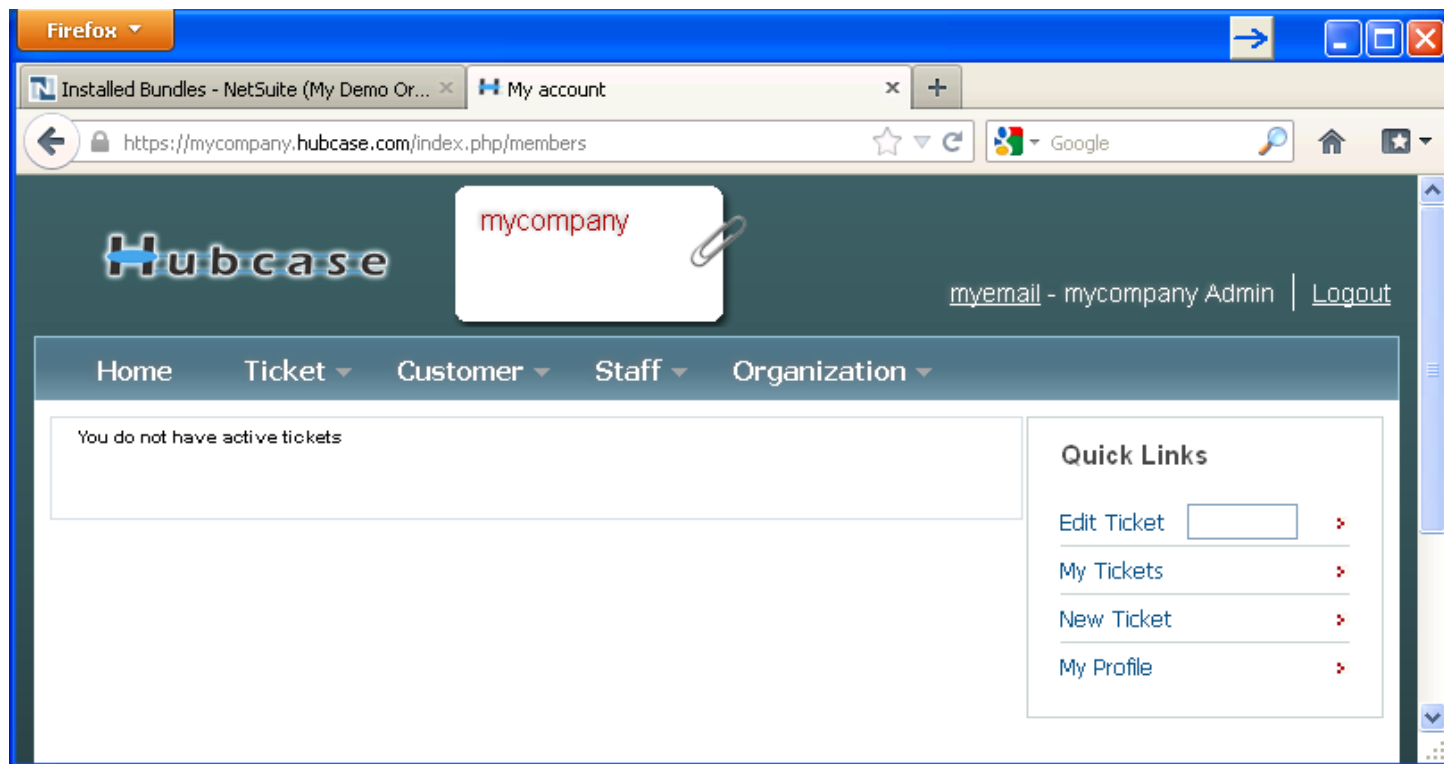
- Browser: Firefox
- Address Bar: https://mycompany.hubcase.com/index.php/webquicksignup/pc_websetup_activ
- Page Title: Organization Signup Activation
- Hubcase Logo: mycompany

The form fields and their values are:

- You Organization Name: mycompany
- You Organization Access Site: <https://mycompany.hubcase.com>
You will be accessing your hubcase using the above.
- Your user name is your email, please set up your password here
- Password: [Redacted]
- Re-type Password: [Redacted]
- Your First Name: John
- Your Last Name: Doe
- Your Phone Number: 555-1212
- The primary system: (for example, Salesforce, NetSuite, Oracle/Siebel, SAP, Remedy etc.)
NetSuite

Activate

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

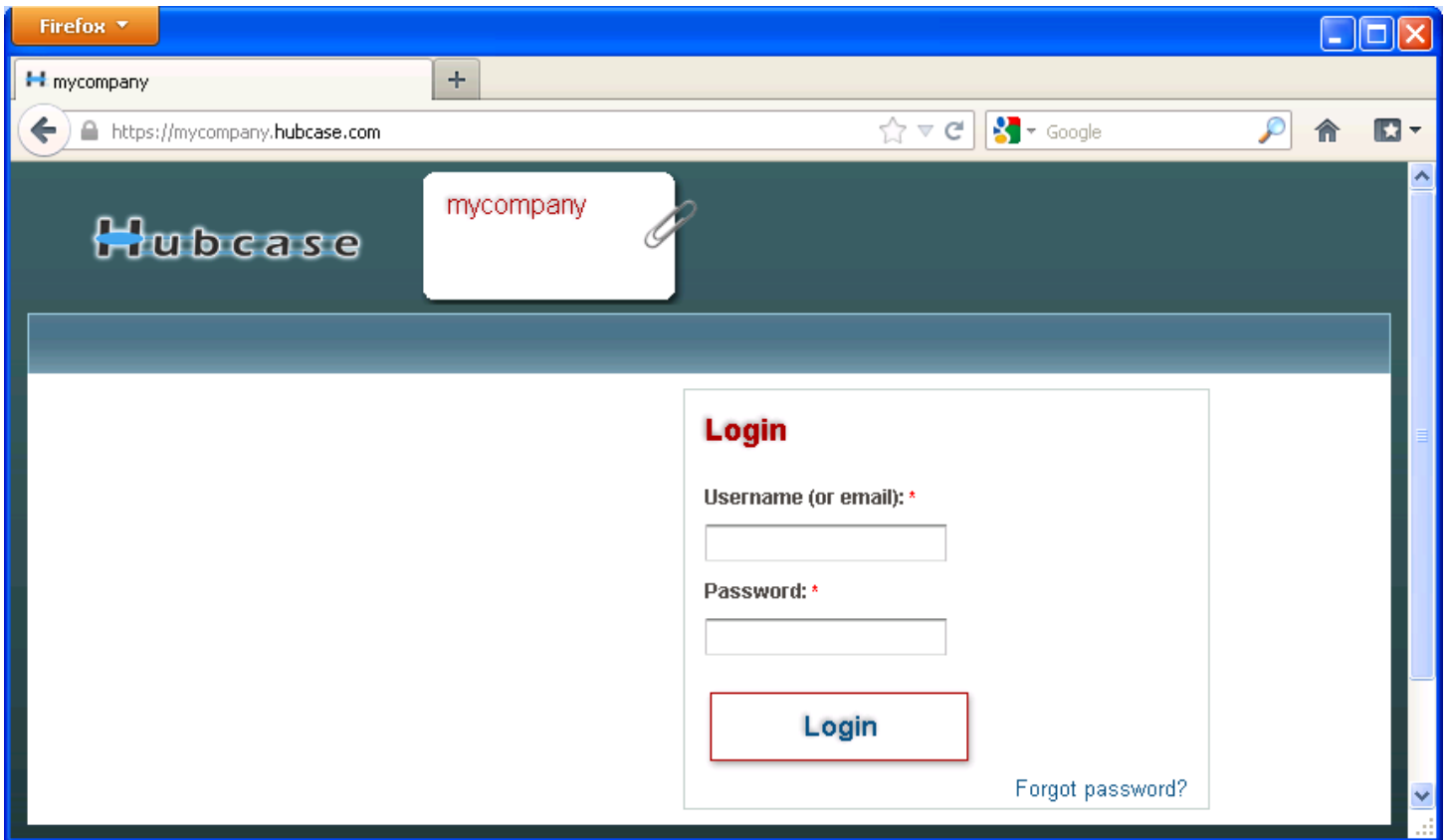


And the sign up and activation for Hubcase membership is now complete.

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:

Home Staff Organization

Search for partners below, you may **ADD** your own if you can't find them here

con Search

<input type="checkbox"/>	NAME
<input type="checkbox"/>	Consultants
<input checked="" type="checkbox"/>	Sconti
<input type="checkbox"/>	Universal Containers

Invite

My partners

ORG ID	NAME	Remove
<input type="checkbox"/> support	Hubcase Support	

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.

Home Staff Organization

Search for partners below, you may **ADD** your own if you can't find them here

con Search

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.

	Field Name	Field Type	Options (for field type "Select" only)	Default Value
Custom Field 01:	<input type="text" value="District"/>	<input type="text" value="Text"/>	<input type="text"/>	<input type="text"/>
Custom Field 02:	<input type="text" value="Impact"/>	<input type="text" value="Text"/>	<input type="text"/>	<input type="text"/>

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

The screenshot shows the Microsoft Dynamics CRM interface. At the top right, it says "Microsoft Dynamics CRM". Below that is a navigation bar with "FILE" and "HOME" tabs. Under "HOME", there are icons for "New Activity", "New Record", "Import Data", and "Advanced Find". The main content area is titled "Hubcase Preference" and contains a "Submit" button, two input fields for "Hubcase URL" (https://nikita-a.hubcase.com/index.php) and "Hubcase API username" (nikita-a), and two input fields for "Your Hubcase Org Id" (nikita-a) and "Hubcase API password" (masked with dots). Below this is the "Encryption Keys" section with instructions: "Enter encryption keys for partners you want to encrypt the data. A key is a password up to 16 characters long." and "Encrypted data can only be decrypted by receiving partner with the same key, and is not be visible to any 3rd party including Hubcase." At the bottom is a table with columns "Partner Name", "Partner Id", "Enabled", and "Encryption Key".

Partner Name	Partner Id	Enabled	Encryption Key
nikita-b	nikita-b	<input type="checkbox"/>	<input type="text"/>
RZ0122A	rz0122a	<input type="checkbox"/>	<input type="text"/>
RZ0122B	rz0122b	<input type="checkbox"/>	<input type="text"/>

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

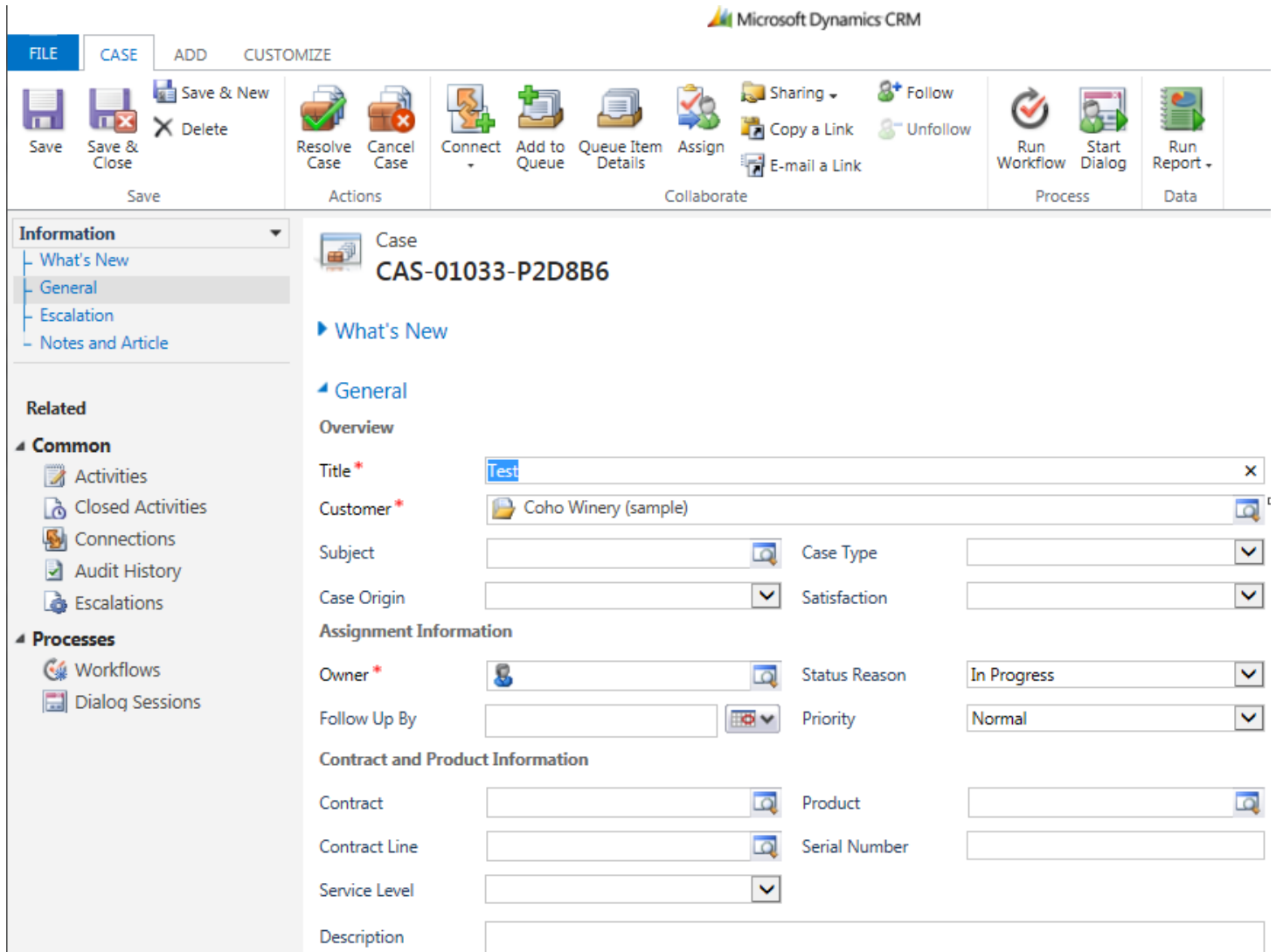
After entering your correct credential for Hubcase, you will be prompted to enter encryption keys for the partners you want to have the data exchange encrypted. Follow the instructions on the screen.

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.



The screenshot shows the Microsoft Dynamics CRM interface for creating a new Case. The ribbon at the top includes 'FILE', 'CASE', 'ADD', and 'CUSTOMIZE' tabs. The 'CASE' ribbon has several groups of actions: 'Save' (Save, Save & Close, Delete), 'Actions' (Resolve Case, Cancel Case), 'Collaborate' (Connect, Add to Queue, Queue Item Details, Assign, Copy a Link, E-mail a Link), 'Process' (Run Workflow, Start Dialog), and 'Data' (Run Report). The main area shows the 'Case' form for 'CAS-01033-P2D8B6'. The left sidebar has 'Information' (What's New, General, Escalation, Notes and Article) and 'Related' (Common: Activities, Closed Activities, Connections, Audit History, Escalations; Processes: Workflows, Dialog Sessions). The form fields are as follows:

What's New	
▶ What's New	
◀ General	
Overview	
Title *	<input type="text" value="Test"/>
Customer *	<input type="text" value="Coho Winery (sample)"/>
Subject	<input type="text"/>
Case Type	<input type="text"/>
Case Origin	<input type="text"/>
Satisfaction	<input type="text"/>
Assignment Information	
Owner *	<input type="text"/>
Status Reason	<input type="text" value="In Progress"/>
Follow Up By	<input type="text"/>
Priority	<input type="text" value="Normal"/>
Contract and Product Information	
Contract	<input type="text"/>
Product	<input type="text"/>
Contract Line	<input type="text"/>
Serial Number	<input type="text"/>
Service Level	<input type="text"/>
Description	<input type="text"/>

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

The screenshot displays the Microsoft Dynamics CRM interface for a case record. The top navigation bar includes 'FILE', 'CASE', 'ADD', 'CUSTOMIZE', and 'LIST TOOLS'. The 'LIST TOOLS' menu is expanded to show 'ESCALATIONS' options: 'Add New Escalation' (circled in red), 'Edit', and 'Delete Escalation Records'. A red circle with the number '2' is placed around the 'Edit' button. The main content area shows the case details for 'CAS-01066-R2X5B9' under the 'General' tab. The 'Escalation' sub-tab is selected, showing a table with columns for 'Global HX ID', 'Destination', 'Created On', and 'Status'. The table is currently empty, with the text 'No Escalation records are available' displayed. A red handwritten note '1 click here' is placed over the table area. The status bar at the bottom indicates 'Status Active'.

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

Escalation Escalations

nikita-b

General

Initiator *	<input type="text" value="nikita-a"/>	Destination	<input type="text" value="ns-partner5"/>
Initiator Company	<input type="text" value="nikita-a"/>	Destination Company	<input type="text" value="ns-partner5"/>
Initiator case number	<input type="text" value="CAS-01033-P2D8B6"/>	Destination case number	<input type="text"/>
Initiator contact name *	<input type="text"/>	Destination contact name	<input type="text"/>
Initiator contact phone *	<input type="text" value="11111"/>	Destination contact phone	<input type="text"/>
Initiator contact email *	<input type="text" value="username @hxqa.onmicrosoft.com"/>	Destination contact email	<input type="text"/>
Global HX ID	<input type="text"/>	Destination Account *	<input type="text" value="nikita-a"/>
Status	<input type="text" value="New"/>	Customer Company	<input type="text" value="Coho Winery (sample)"/>
Priority	<input type="text" value="High"/>	Customer contact name	<input type="text"/>
CaseId *	<input type="text" value="Test"/>	Customer contact email	<input type="text" value="someone10@example.com"/>
Owner *	<input type="text" value="Nikita Grudin"/>	Customer contact phone	<input type="text" value="555-0159"/>

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

Case: 110 File Upload Failed (mycompany)

Primary Information

Number	110	Contact		Priority	Medium
Subject	File Upload Failed	Email(s)	bsparling@wolfeelectronics.com	Date Closed	
Company	mycompany	Phone	650-555-3226	Date Last Reopened	
Assigned To		Status	Not Started		

Incident Information

Incident Date	2/13/2013 10:31 am	Module		Origin	
Item		Type		Inbound Email Address	
Product		Case Issue			

Communication | **Related Records** | **Escalations** | **Time Tracking** | **System Information** | **Custom** | **Sales Associate** | **B2B via Hubcase**

mycompany (inbound) | Escalate to (New) partner

Summary	File Upload Failed	Initiator	mycompany	Destination	ns-partner5
Internal HX ID	9	Initiator Company	mycompany	Destination Company	NS Partner5
Global HX ID	mycompany-20130213-178331	Initiator Case Reference	190	Destination Case Reference	110
HX Escalation Status	New	Initiator Contact Name	Brad M Sparling	Destination Contact Name	
Priority	High	Initiator Contact Phone	650-555-3226	Destination Contact Phone	
Description	----- 2/12/2013 8:34 pm by Customer: File Upload Failed	Initiator Contact Email	bsparling@wolfeelectronics.com	Destination Contact Email	
		Customer Company	Baron Chess & Assoc.	Destination Account	mycompany
		Customer Contact	Bob Chess	SLA5	
		Customer Contact Phone	650 627 1000	Contract No.	
		Customer Contact Email	chess@chessart.com		

Reply to mycompany

Id	Date Created	HX (B2B) Status	Comment By	Comment	Attachment
9	2/13/2013 10:31 am	New	mycompany	Initial B2B escalation. see description	

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

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