Hubcase for Salesforce

Installation and Configuration Guide

Version 4.1

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

Installation and configuration require understanding of both Salesforce and Hubcase.

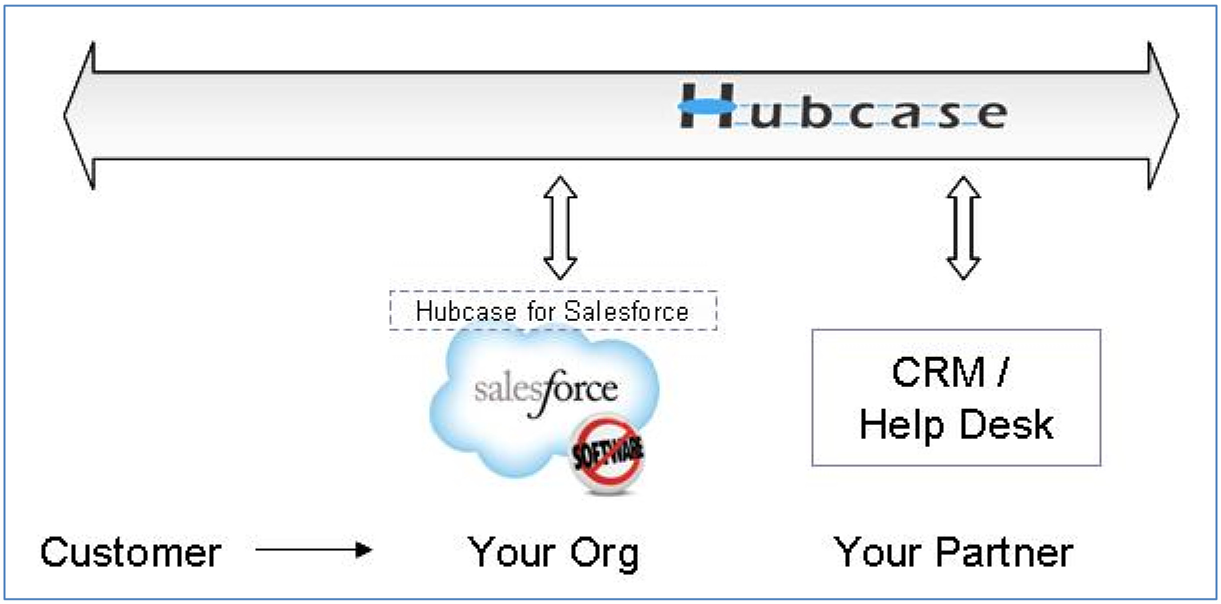
Please contact support@hubcase.com for assistance

Contents

Overview

Hubcase for Salesforce is a Salesforce AppExchange published app that adds B2B escalation capability to your support cases under your Salesforce service cloud.

Specifically, the package adds a “B2B Escalation” button and section on the ***Cases*** form. If permitted by user role, the button launches the user interface to facilitate B2B communication via Hubcase. It does not replace or alter existing Salesforce behavior.



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

In other words, “Hubcase for Salesforce” app is a plug-in or adapter that connects your Salesforce instance to Hubcase.

This document will guide you on how to:

- Install and configure Hubcase for Salesforce App.
- Setup Hubcase membership for your organization, and configure communication with your Salesforce instance.

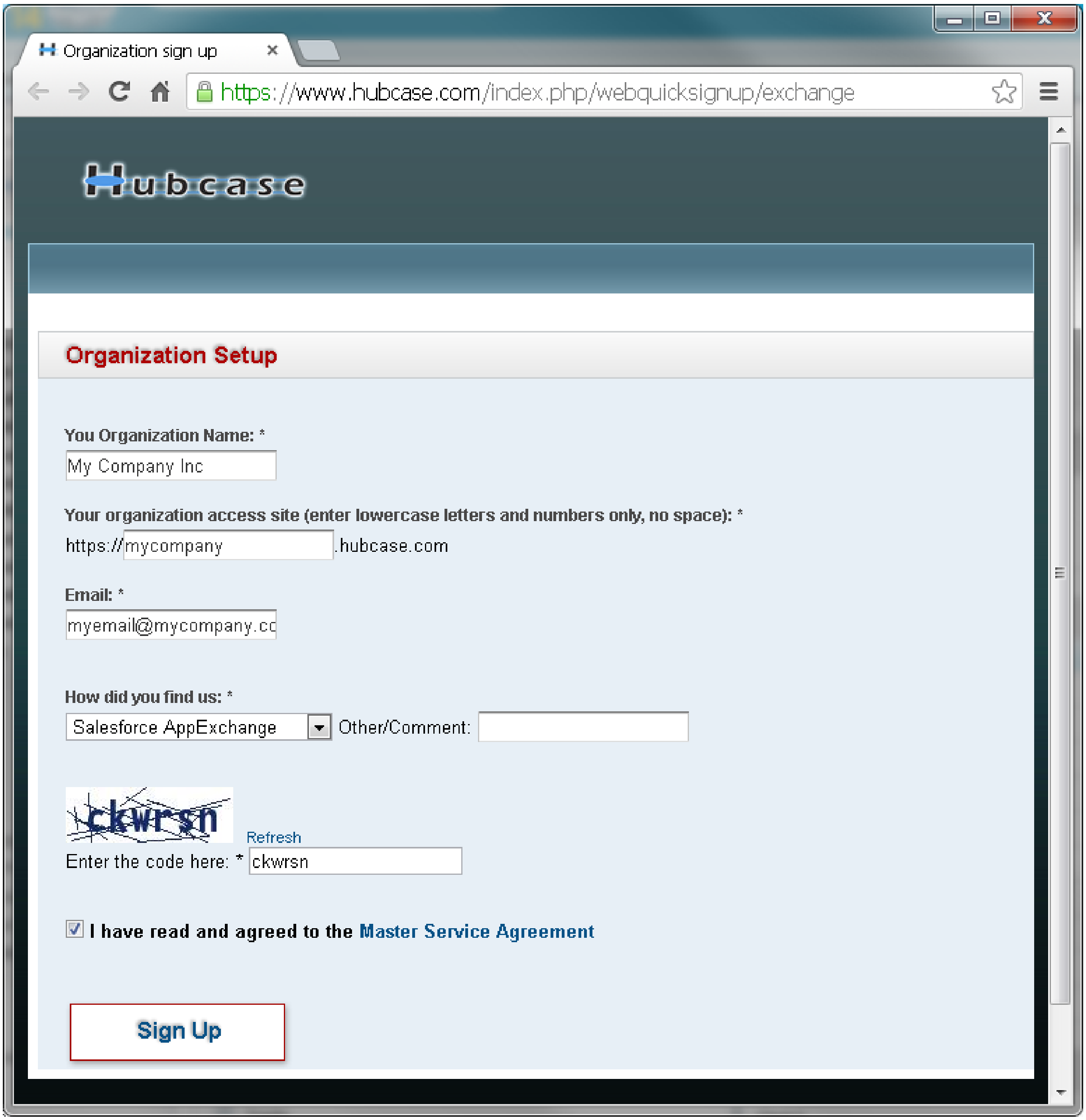
Please note that the installation and configuration only need to be done once by your system administrator, and only occasional maintenance is needed. Additional information can be found at http://www.hubcase.com/exchange_salesforce.html

1 Setup Hubcase portal account for your organization

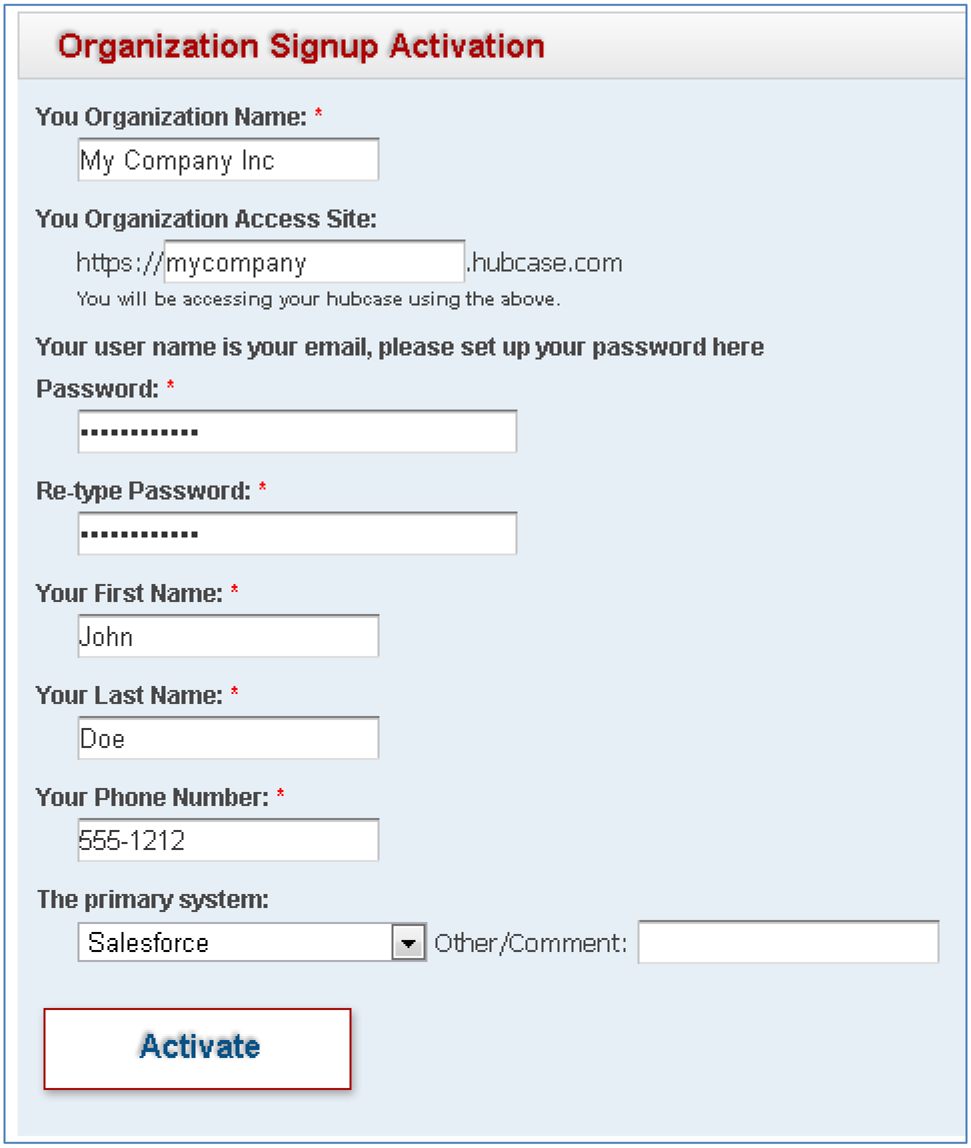
1.1 Sign up and activate a Hubcase account

To setup Hubcase membership for your organization, open a new browser tab / window and point to: https://www.hubcase.com/index.php/webquicksignup/exchange

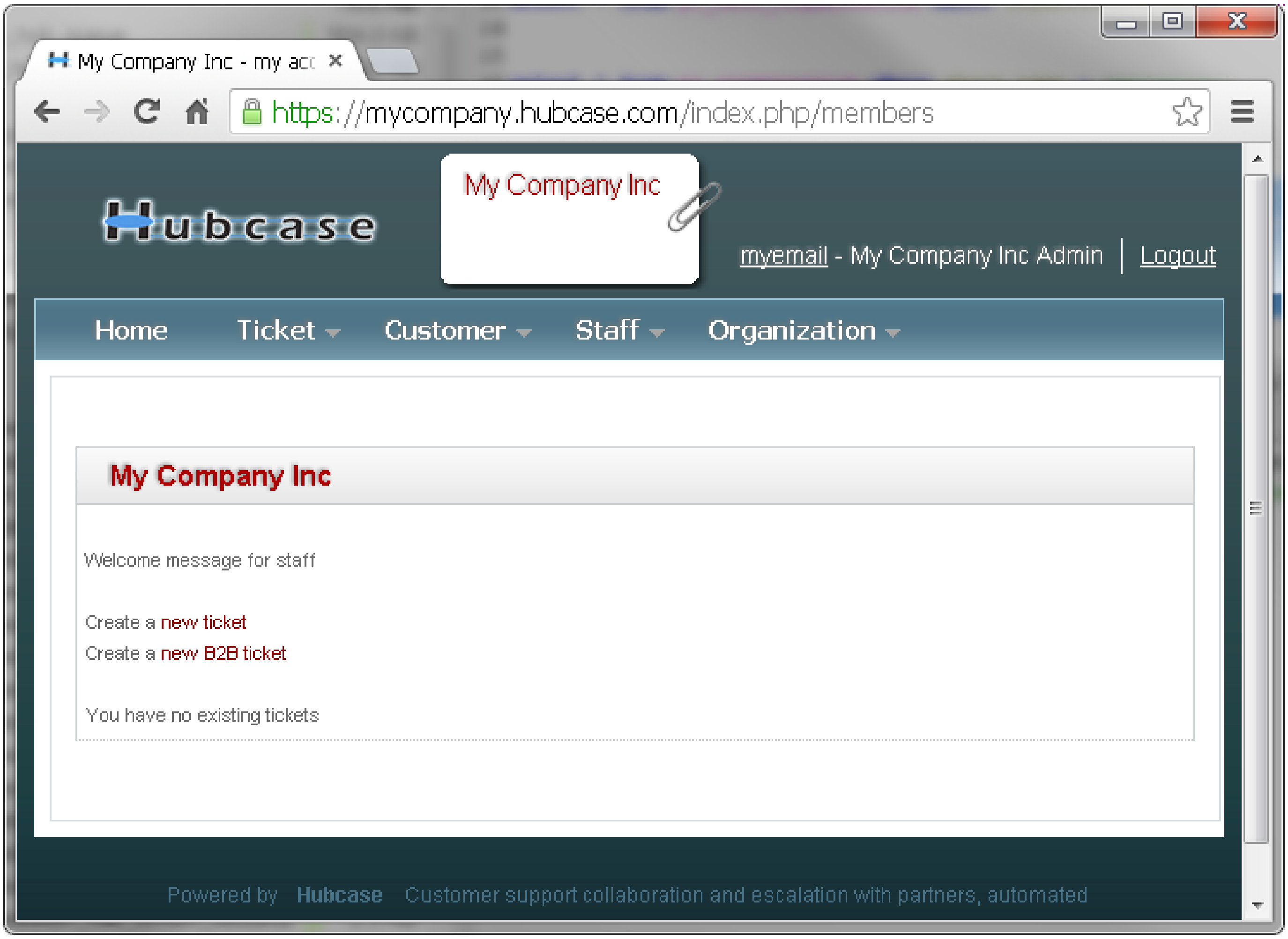
Please enter your company information to create a Hubcase account:



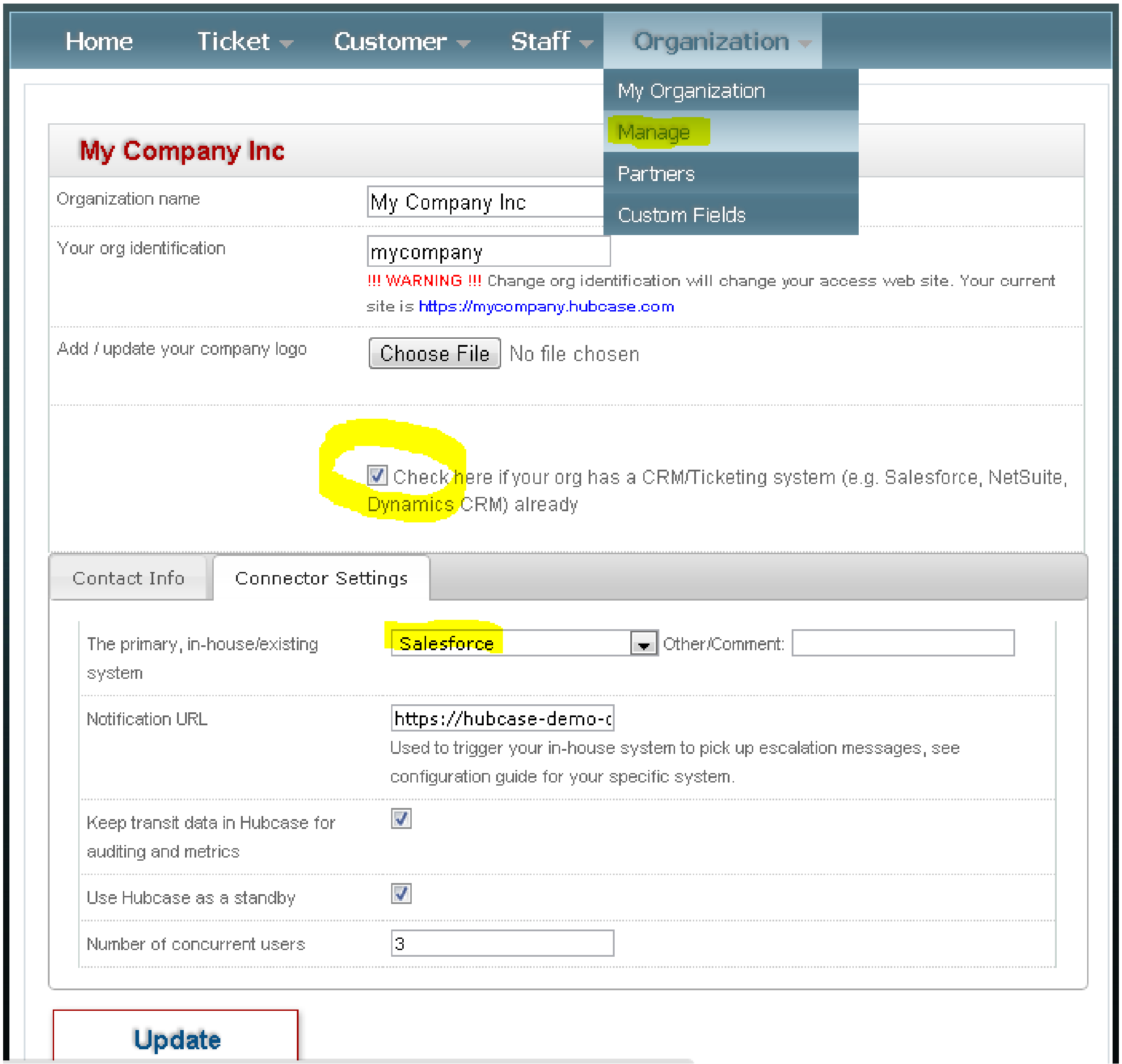
You will receive an activation email after clicking [Sign Up]. Please follow the link provided in the email to activate your account.



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



Since you are setting up to connect to your existing CRM, you will need to go to *Organization > Manage* form to specify your CRM system. Make sure to check the box to let Hubcase know to connect to your current CRM system. Then click [Update].

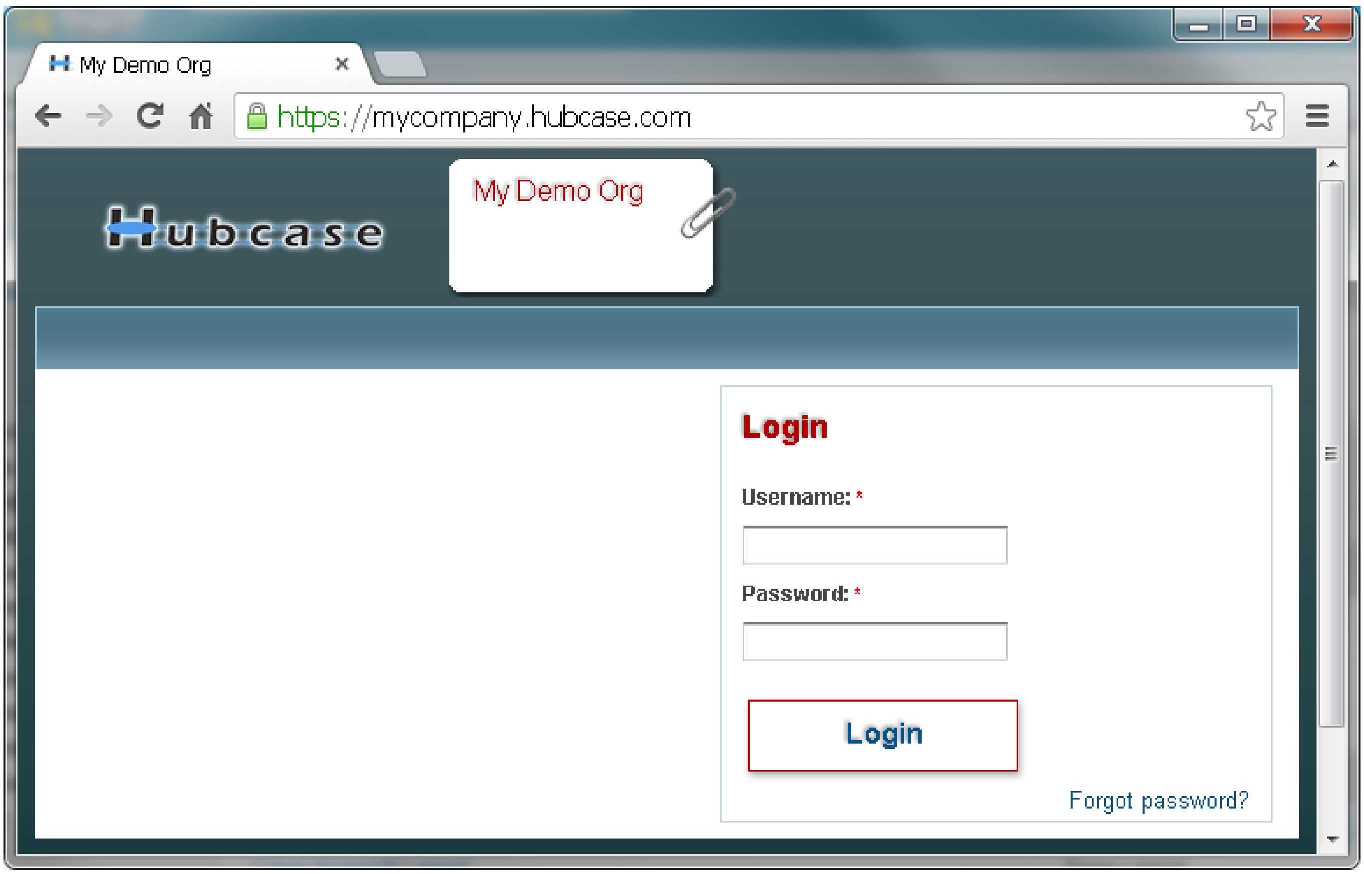


The sign up and activation for Hubcase membership is now complete.

1.2 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:

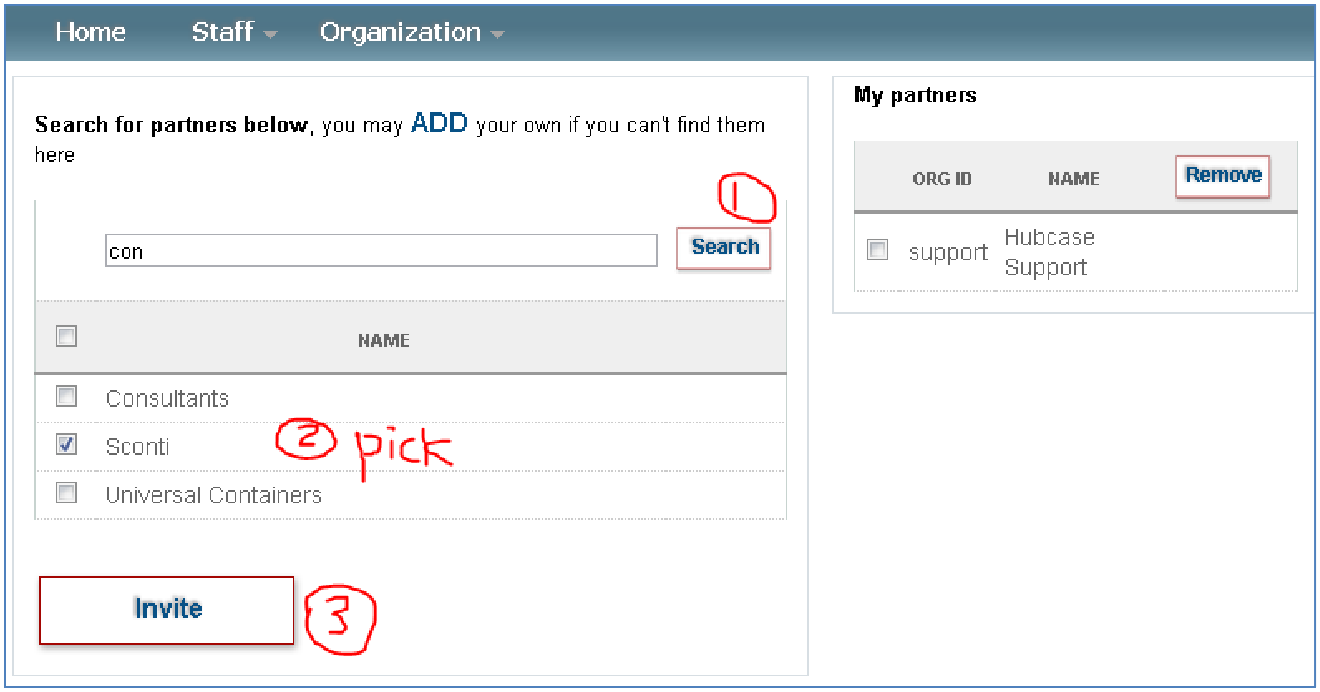
- https://**mycompany**.hubcase.com
- Username is your email address
- Password is the one you setup during activation



Please send email to support@hubcase.com for any questions.

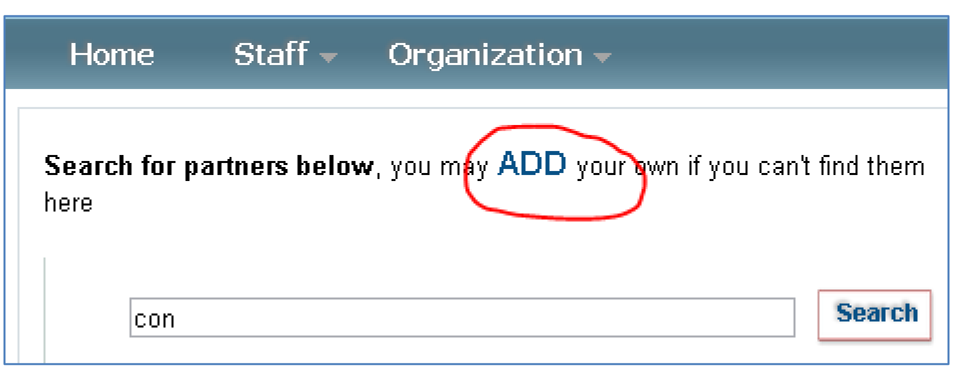
2 Setting up B2B escalation partners

To setup your B2B escalation partners, you need to login to your Hubcase portal first, then 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]. For testing purposes, please add "NS Partner5" as one of your partners. The invited partner MUST accept your invitation before they appear under the "My partners" list. Make sure to confirm that the new partner is listed under the *Organization > Partners* menu.

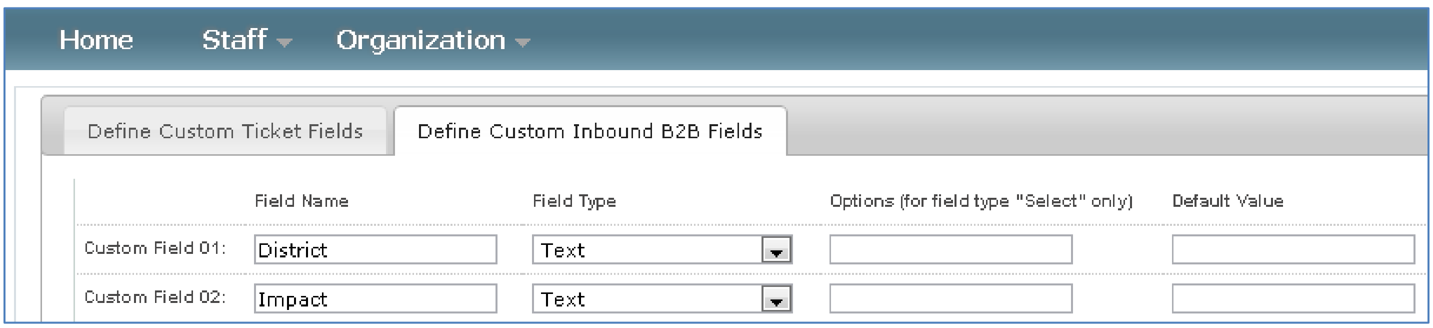
If your partner is not yet a member of Hubcase, you can "ADD" them as shown in the screenshot below. The partner contact will then get an email notification and be asked to activate their Hubcase membership account.



3 Setup B2B escalation custom fields

Hubcase members 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" tab to define or update your inbound B2B custom fields.



A custom field defined as Field Type "Select" should enter "Options" in pipe delimited format. For example, Options for a Select for Boeing Airplane Models, can be entered as "737 | 747 | 787", if you want empty to be an option, put a pipe in front like " | 737 | 747 | 787".

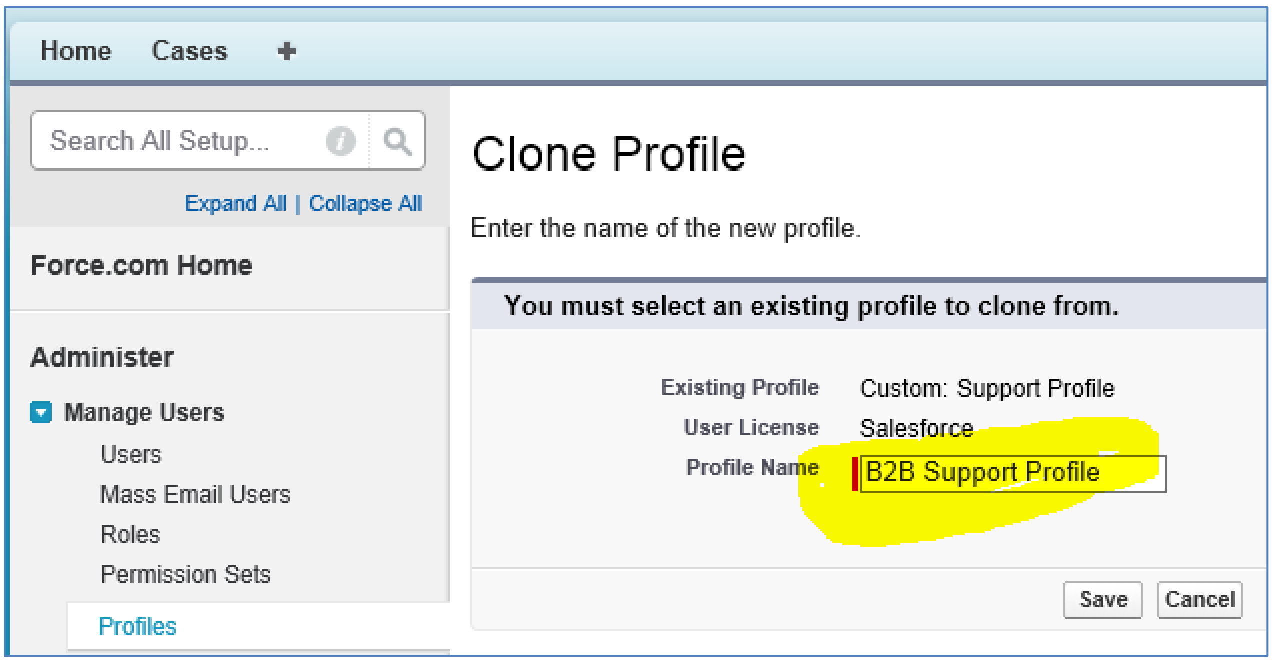
Note that anything after the first blank "Field Name" is ignored, so you should not leave any line in the middle empty. For example, if you have 5 custom fields, it should be defined from "Custom Field 01" through "Custom Field 05". However, if you populate "Custom Field 01" through "Custom Field 03", leaving "Custom Field 04" empty, then populate "Custom Field 05" and "Custom Field 06", only the first 3 customs fields are taken, "Custom Field 05" and "Custom Field 06"will be ignored.

4 B2B Escalation user and profile consideration

Before installing “Hubcase for Salesforce” app, you must consider who will be using the Hubcase B2B Escalation function.

B2B Escalation function is launched from the ***Case*** from, determined by the case page layout depending the user’s profile. It is important to decide which profile has permission to access B2B Escalation. Existing profiles can be used. You may opt to create a new profile.

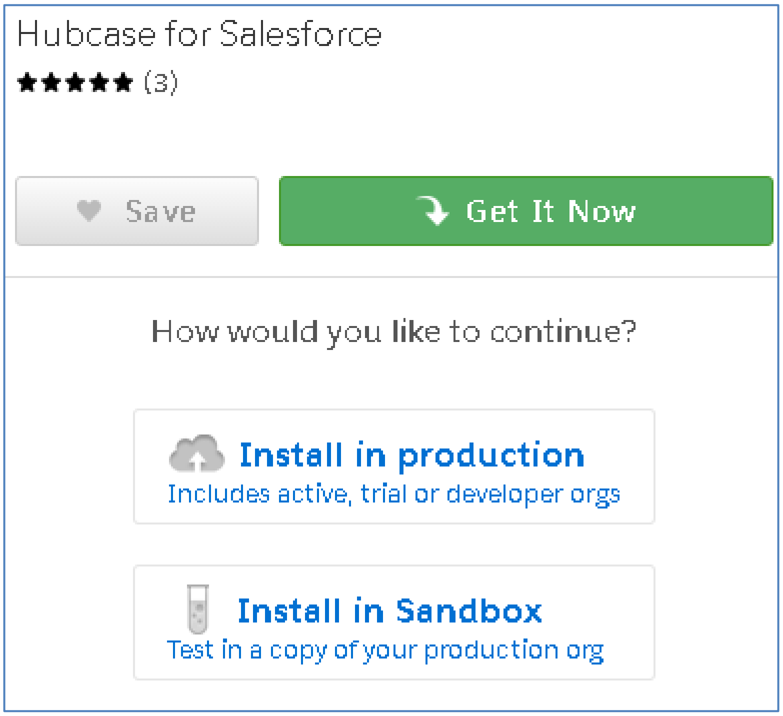
The following screen shows how to create a new profile “B2B Support Profile” by clicking *Profiles > New Profile*, and by cloning from “Custom: Support Profile”.



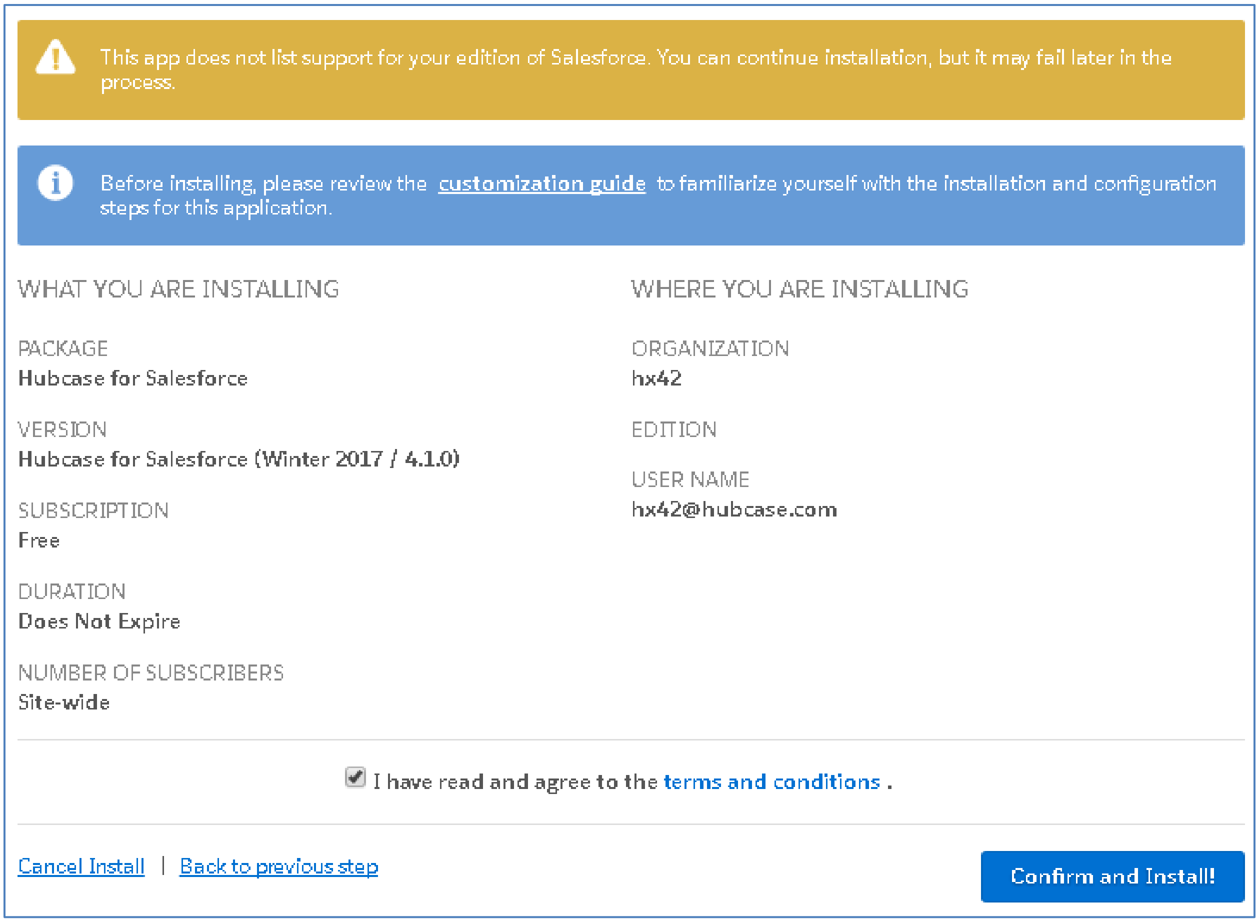
5 Install “Hubcase for Salesforce”

Go to our AppExchange listing “Hubcase for Salesforce” :
http://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IQuWEAW

Click [Get it Now]. You will be shown the following screen. You may be prompted to login along the way if you did not login.



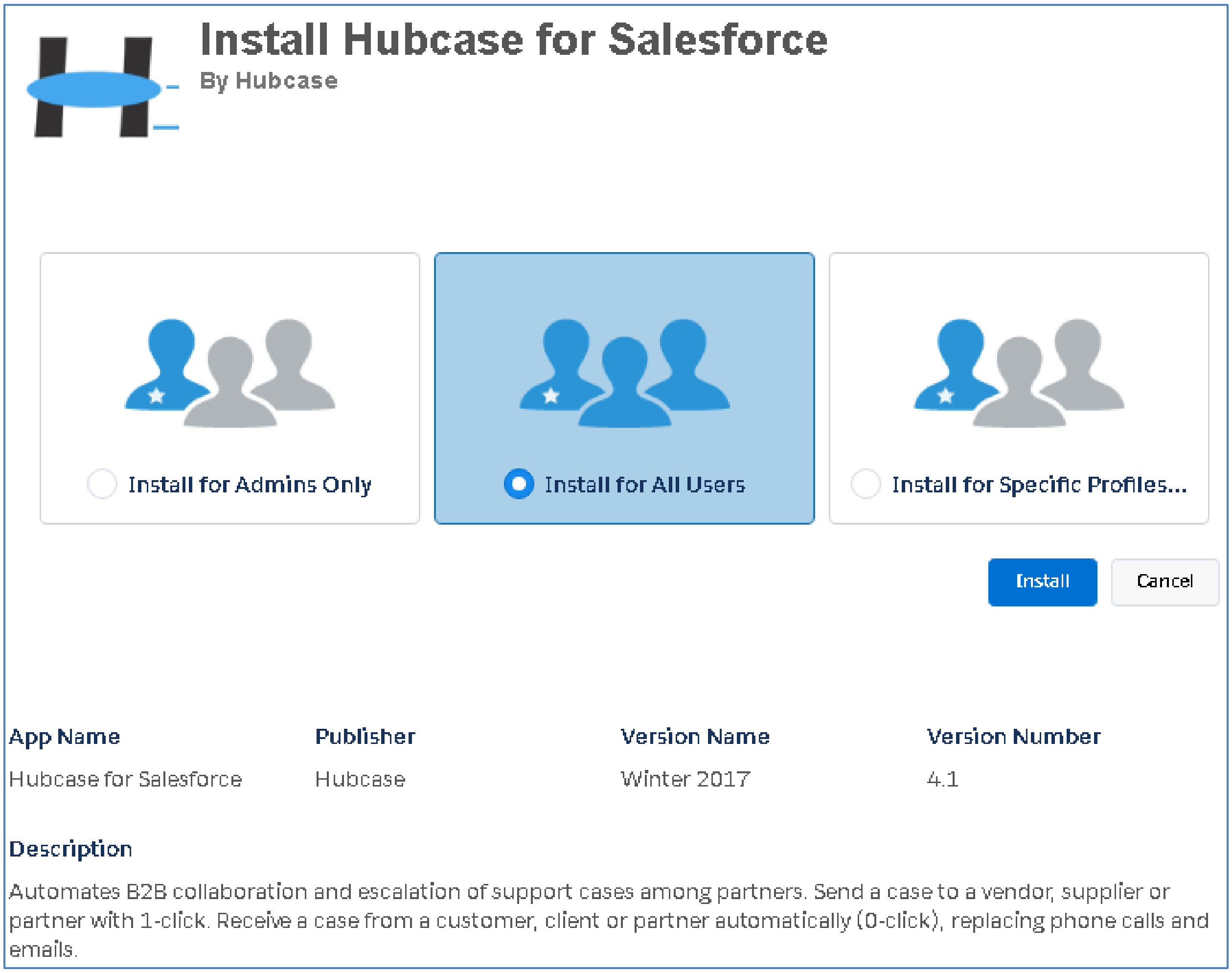
Select “Install in production” if you are installing in production or Developer instance. After selection, the following screen will be shown



Click on [Confirm and Install]. Note that the App does not officially support developer account, but it works under developer account technically.

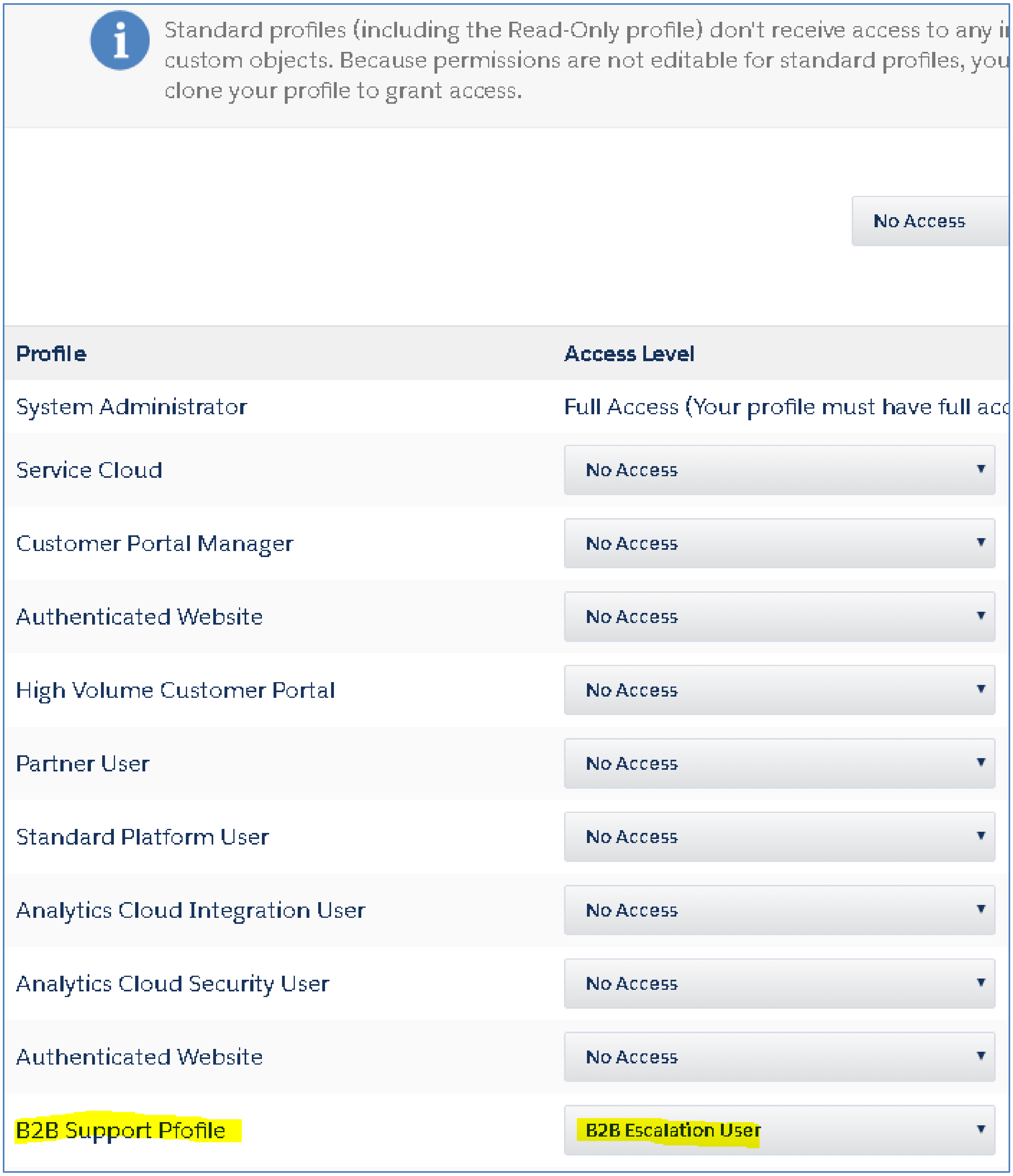
You may be prompted to login or select a login to proceed.

Next, you will be asked to "Install for…"

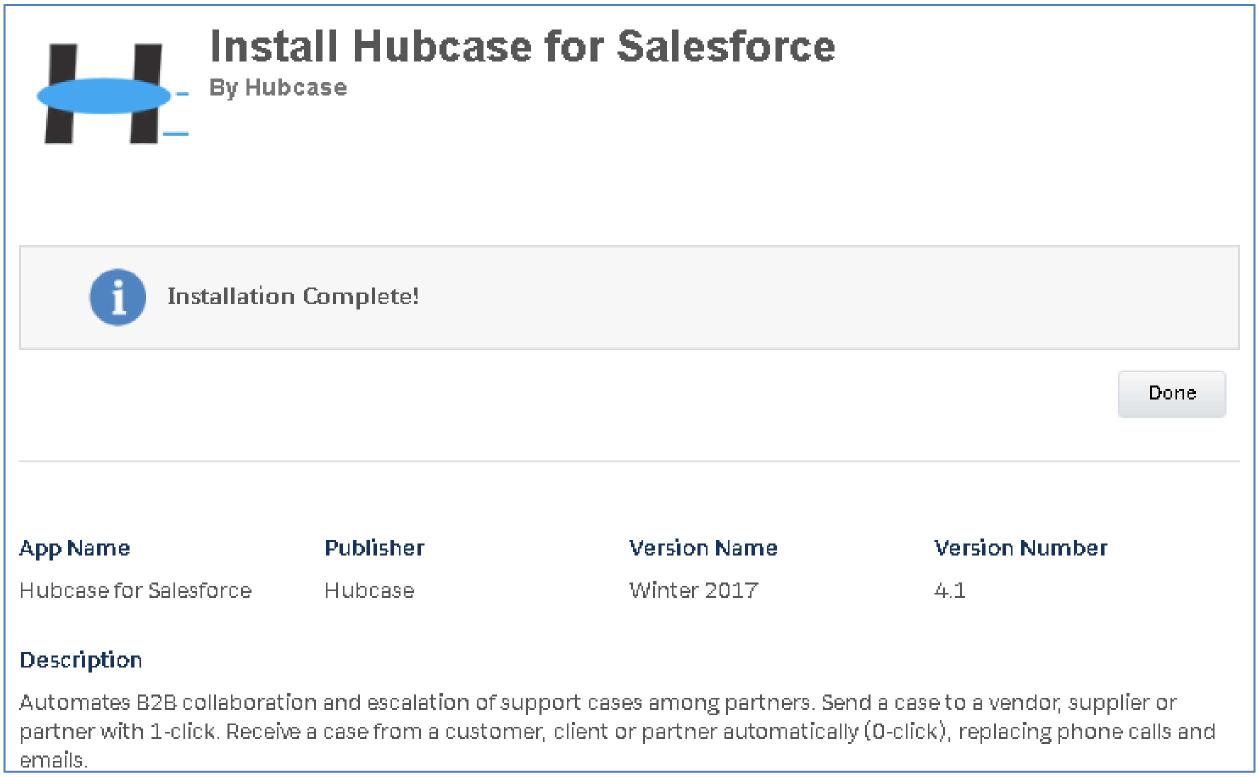


Before [Install], you have three choices:

- Install for Admins only - Permissions have to be granted later to allow other users to access B2B function. This is a conservative choice, but requires admin expertise to make it work for other users.
- Install for All Users - Select this option for simplicity. Restrictions can still be set using page layouts and other means so that only certain users can use B2B function.
- Install for Specific Profiles… - Select this option if you have decided or created a profile (e.g "B2B Support Profile") as B2B users. You could make the selection as shown below.



After you have made the choice of “Install for…”, click [Install] to complete the installation



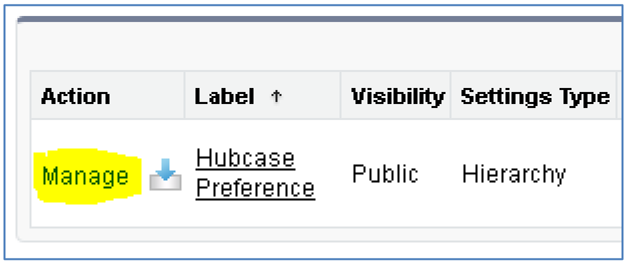
You have completed the installation once you see the above screen!   Sometimes the system will tell you installation takes time, and you will be notified by email once completed.

Configure “Hubcase Preference”

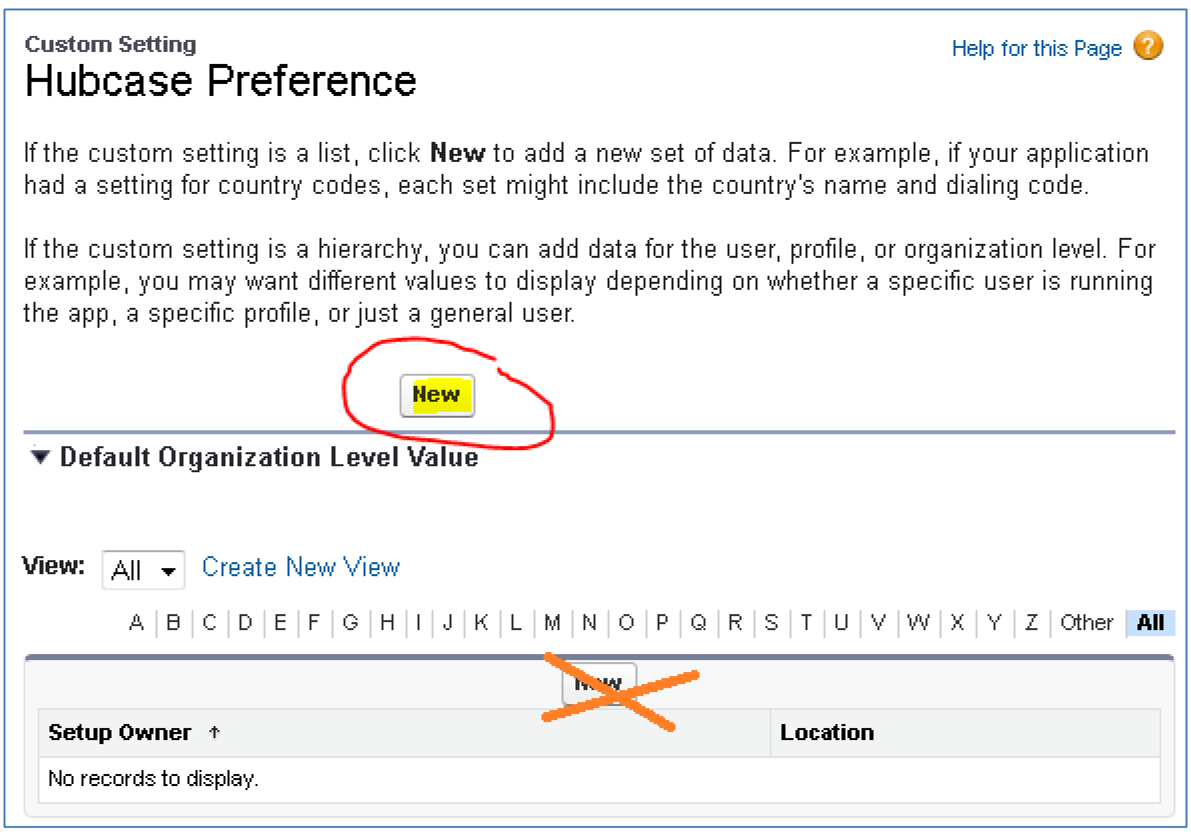
You have installed “Hubcase for Salesforce” App, and setup your Hubcase membership. This step is to establish the link between the two.

Login to your Salesforce account, and navigate to Setup > Develop > Custom Settings.

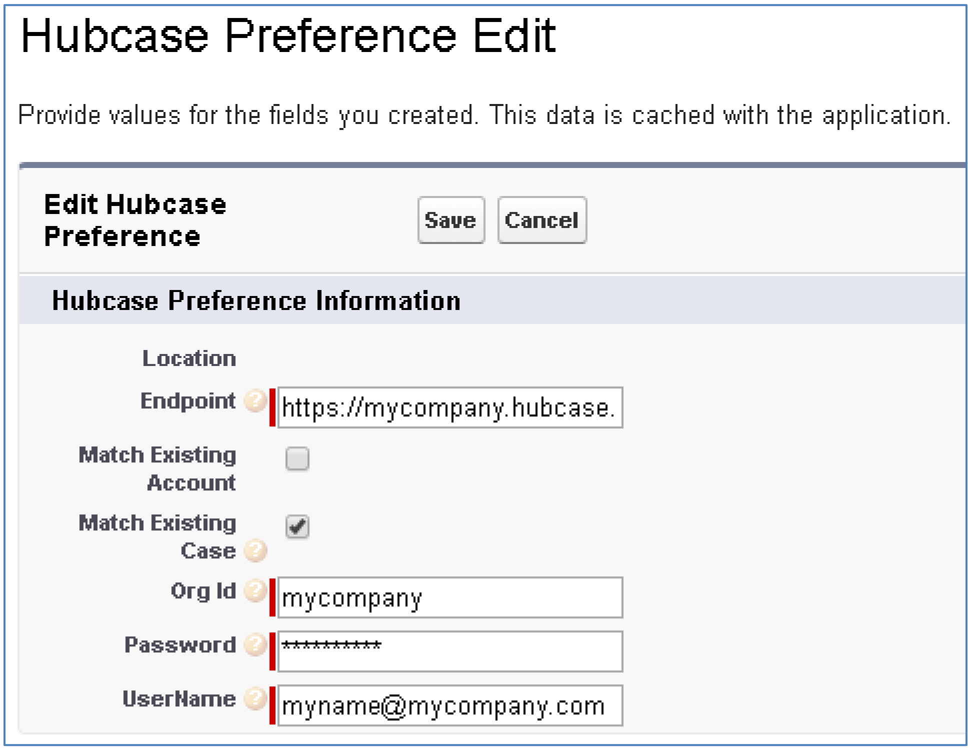
Click Manage in front of “Hubcase Preference”.



Create a “New” Preference as shown below. Make sure to click the “New” at the top section



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

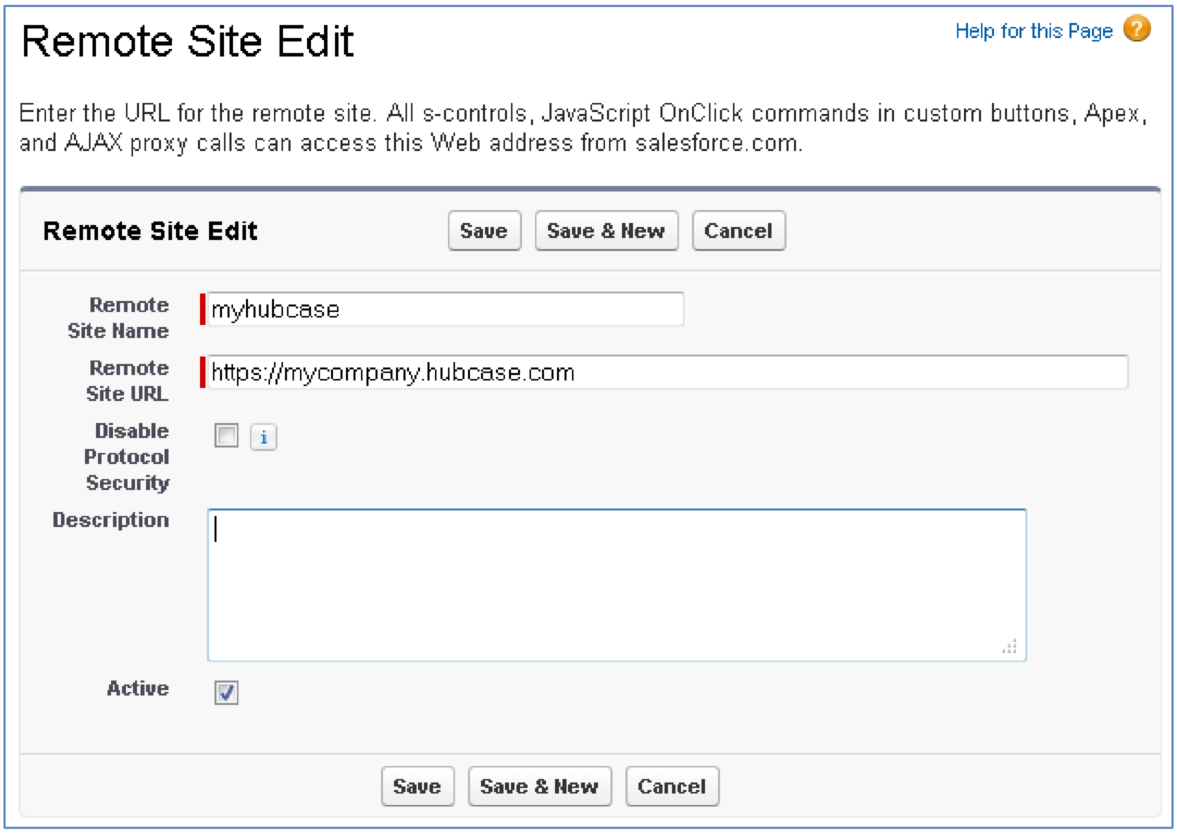


- Endpoint must be in this format: https://mycompany.hubcase.com/index.php
  - (replace ‘*mycompany’* with your own org identification in Hubcase)
- Match Existing Case: Should be checked in most situations. When checked: If your org is B2B escalation destination, and the initiator provided “Destination Case Reference”, the system will use it to match existing Case Numbers. If found, the B2B message is attached to an existing case. Otherwise, a new case is created.
- Match Existing Account: If not checked, new inbound case will not have Account field populated. If checked, and inbound B2B message has “Destination Account” provided, an attempted will be made to populate the account field of the new inbound case by matching “Destination Account” against an existing Salesforce Account by name.
- Org Id: (replace ‘*mycompany’* with your own org identification in Hubcase), and Org Id must be in lowercase.
- Username and Password are the credentials you created for your Hubcase portal account.

6 Add Hubcase.com as a permitted remote site

You need to make Hubcase your recognized external site. Follow the following steps to enter your Hubcase portal site info as shown below:

Go to *Setup > Security Controls (Administration Setup area) > Remote Site Settings*



7 Configure Cases Layout to expose B2B Escalation button

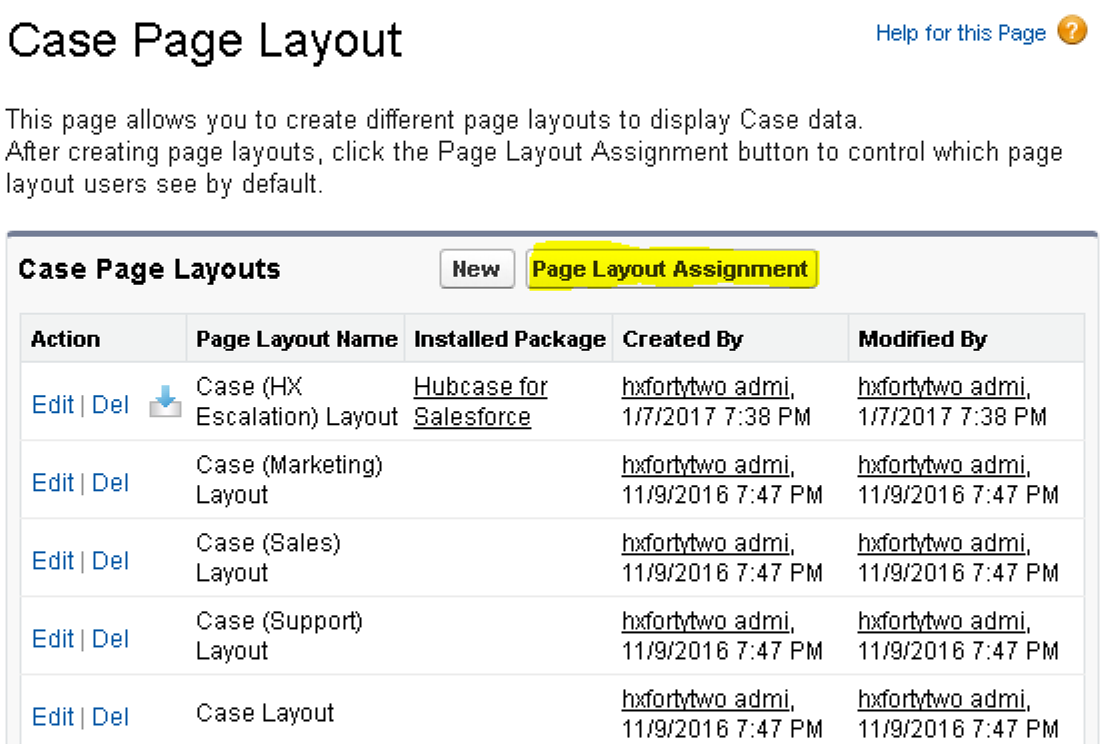
Users who will be using the B2B escalation functions need to use a Cases template that includes B2B escalation components. This can be done by either:

- Using “Case (HX Escalation) Layout” provided by Hubcase package, or
- Edit the existing Layouts.

The following shows how to a) make packaged “Case (HX Escalation) Layout” as cases layout for select user profiles, and b) create a new Layout and edit the new layout to expose B2B escalation function

7.1 Make packaged “Case (HX Escalation) Layout” as cases layout.

Setup > App Setup > Customize > Cases > Page Layouts



Case Page Layout

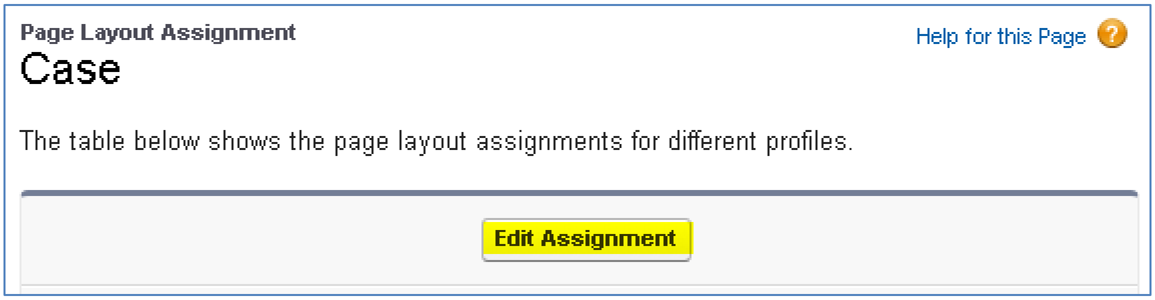
Help for this Page

This page allows you to create different page layouts to display Case data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

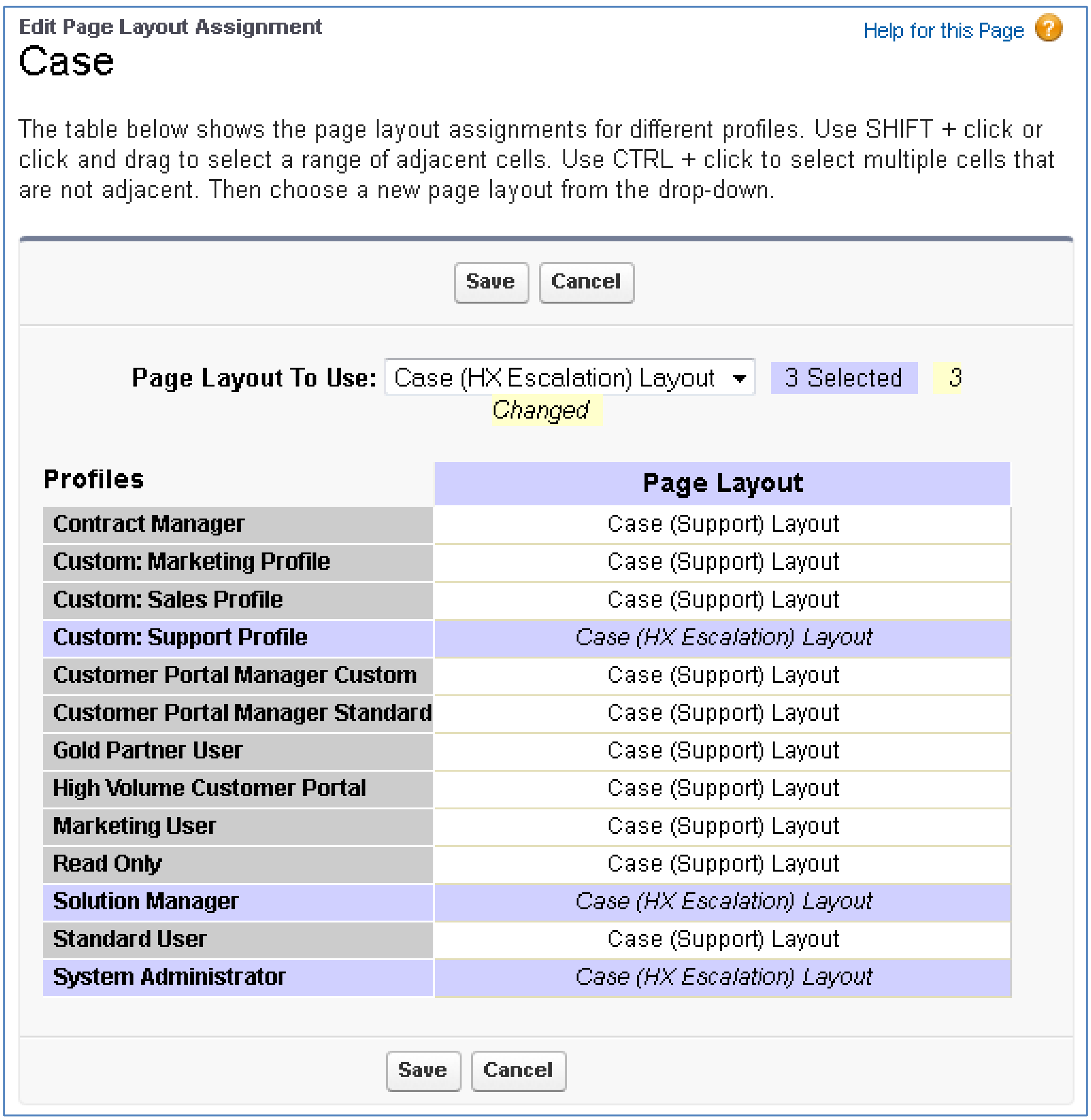
Case Page Layouts New | Page Layout Assignment

Action	Page Layout Name	Installed Package	Created By	Modified By
Edit | Del	Case (HX Escalation) Layout	Hubcase for Salesforce	hxfortytwo admi, 1/7/2017 7:38 PM	hxfortytwo admi, 1/7/2017 7:38 PM
Edit | Del	Case (Marketing) Layout		hxfortytwo admi, 11/9/2016 7:47 PM	hxfortytwo admi, 11/9/2016 7:47 PM
Edit | Del	Case (Sales) Layout		hxfortytwo admi, 11/9/2016 7:47 PM	hxfortytwo admi, 11/9/2016 7:47 PM
Edit | Del	Case (Support) Layout		hxfortytwo admi, 11/9/2016 7:47 PM	hxfortytwo admi, 11/9/2016 7:47 PM
Edit | Del	Case Layout		hxfortytwo admi, 11/9/2016 7:47 PM	hxfortytwo admi, 11/9/2016 7:47 PM

Then click on [Edit Assignment] on the next screen.



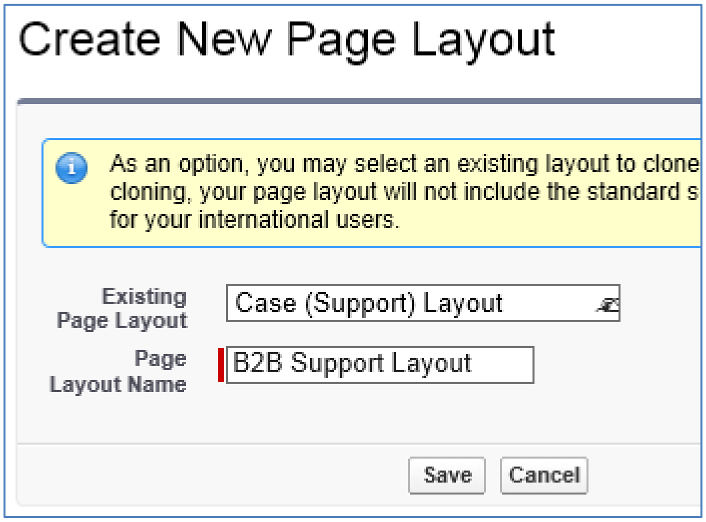
Select (Ctrl click) Profiles you want to handle B2B escalation, then go to the 'Page Layout' column. Use the drop down list to select Case (HX Escalation) Layout.



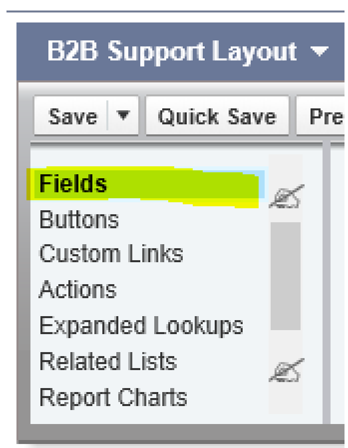
Click [Save].

7.2 Create a new Layout and edit the new layout

Go to *Setup* > *Customize* > *Cases* > *Page Layout* > *New*, and clone from existing Case (Support) Layout

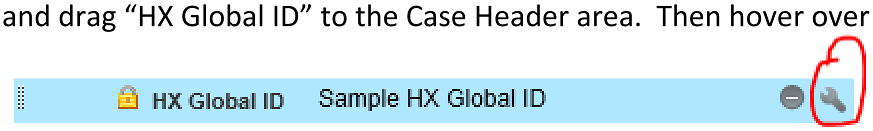


Edit the new "B2B Support Layout"

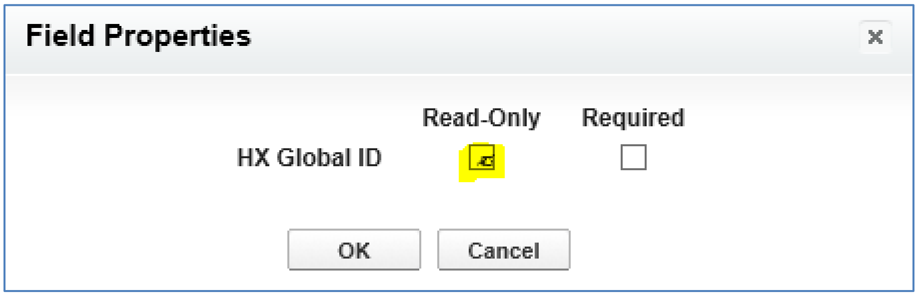


Select Fields at the top left pane,

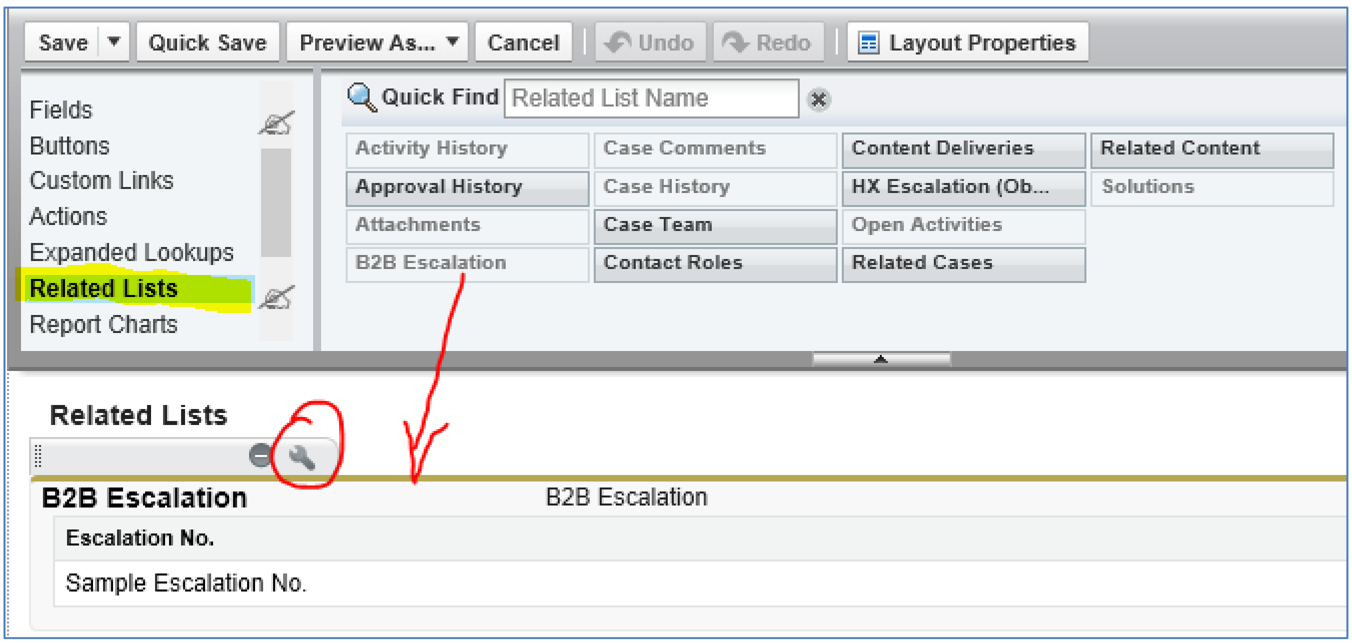
and drag "HX Global ID" to the Case Header area. Then hover over the field, and click on configure.



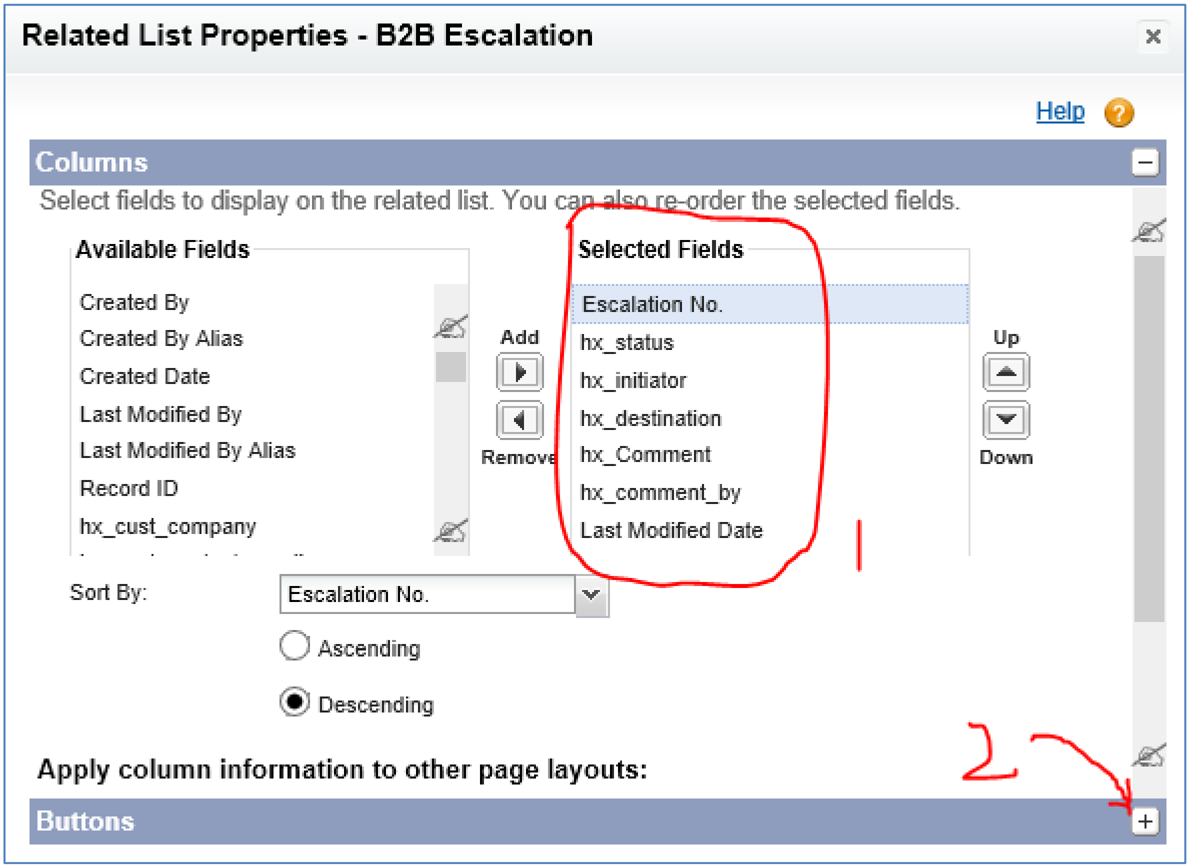
Make sure “Read-Only” is checked:



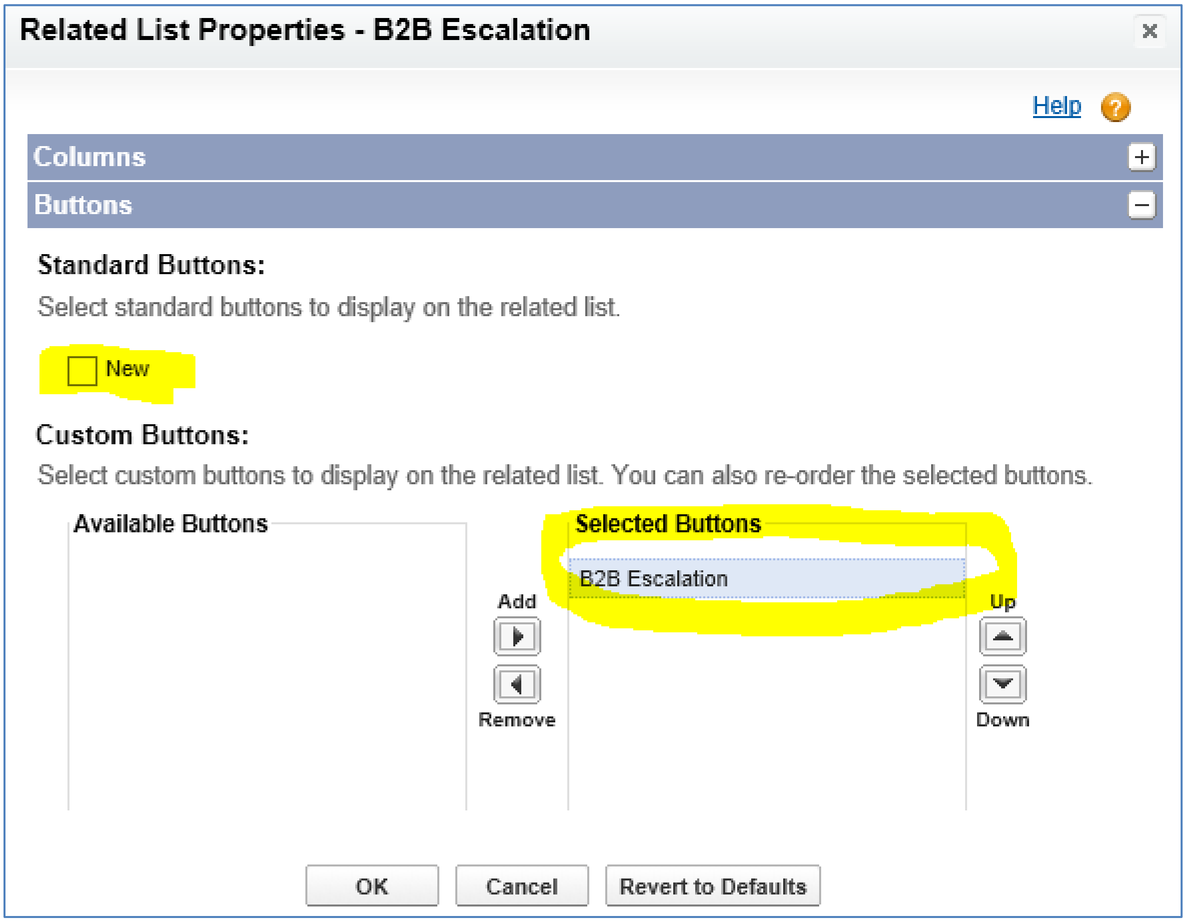
Now, select Related Lists, and drag B2B Escalation to Related List area of the screen.



Click on circled configure button, and select the fields to display in the related list grid as shown at step 1 below:

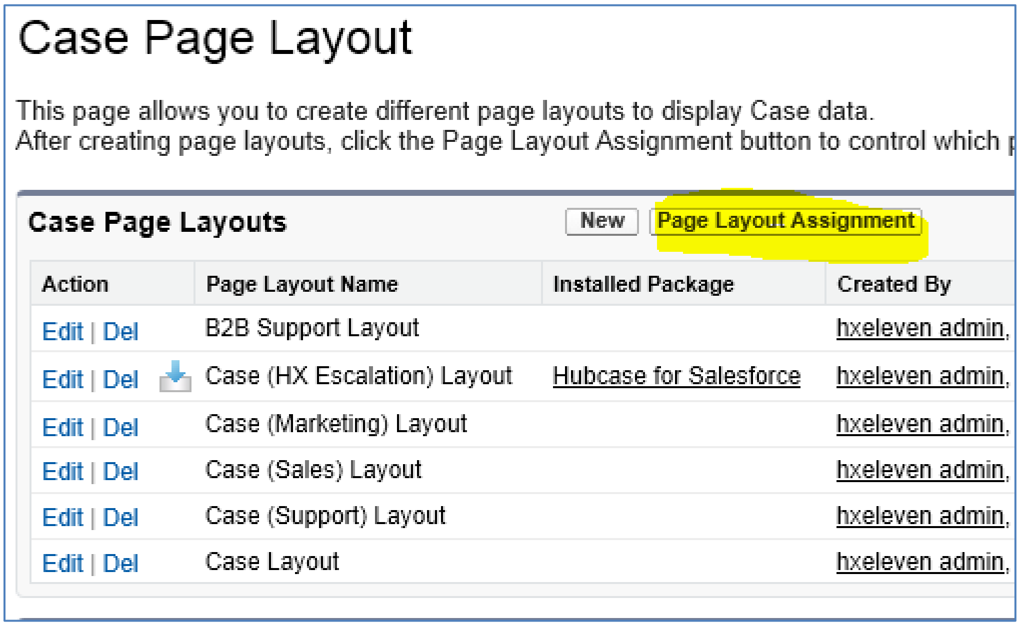


Click on the "+" as shown at step 2 above to expand "Buttons" configure. Make sure "New" is unchecked, and "B2B Escalation" is selected to the right as shown below:

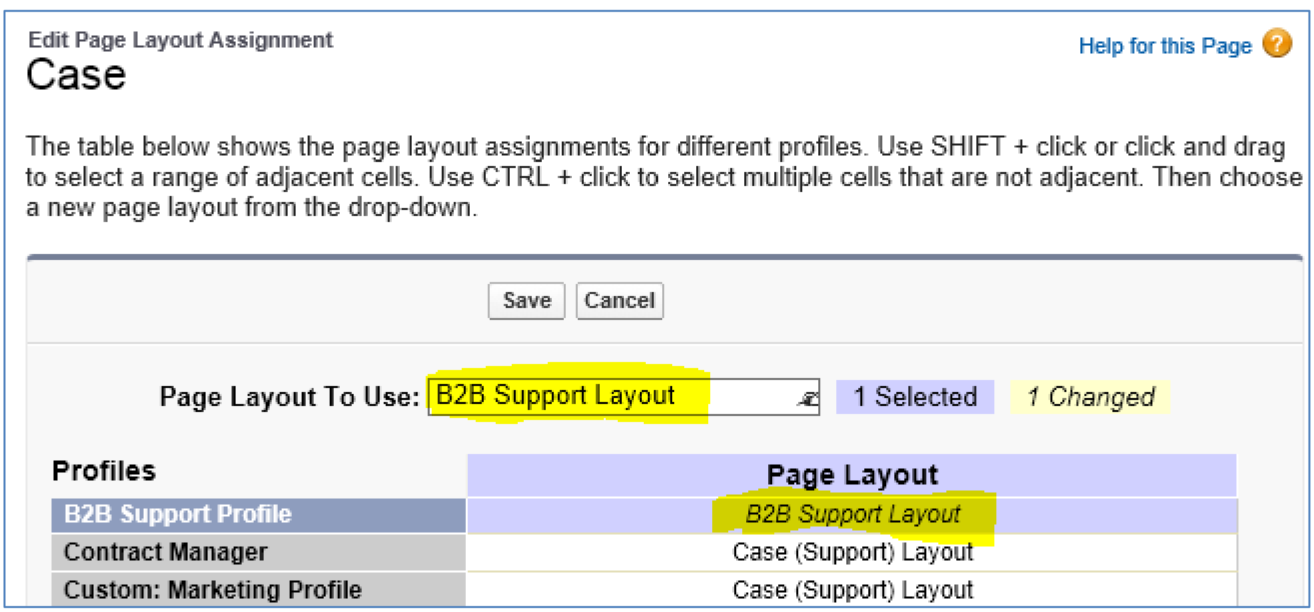


Save this form, and make sure you also save the page layout.

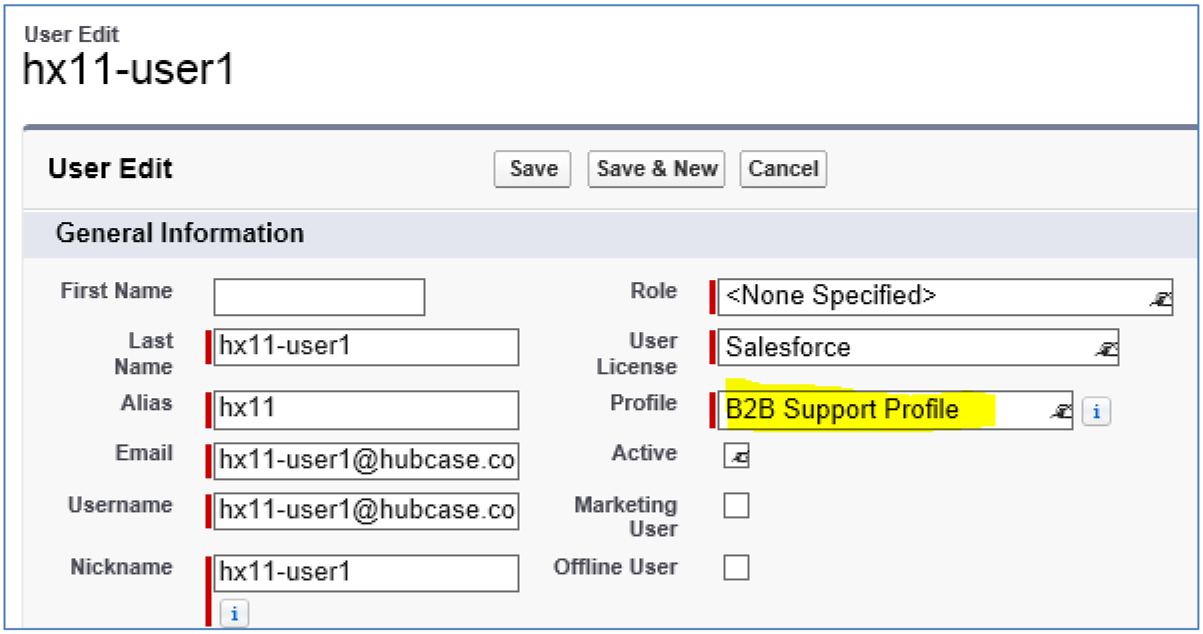
Now edit Case Page Layout Assignment.



Select B2B Support Layout for profile “B2B Support Profile”, and Save.

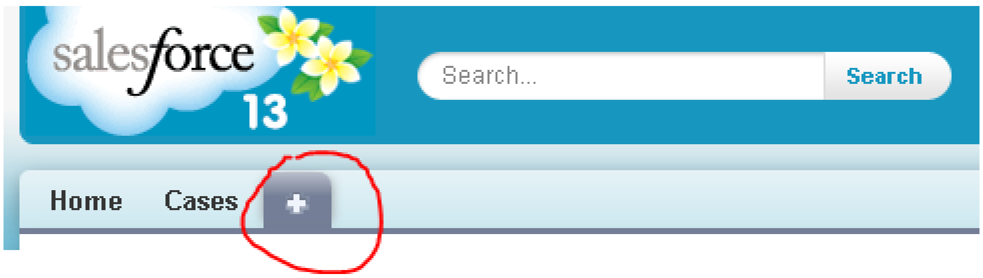


Assign user to the new profile

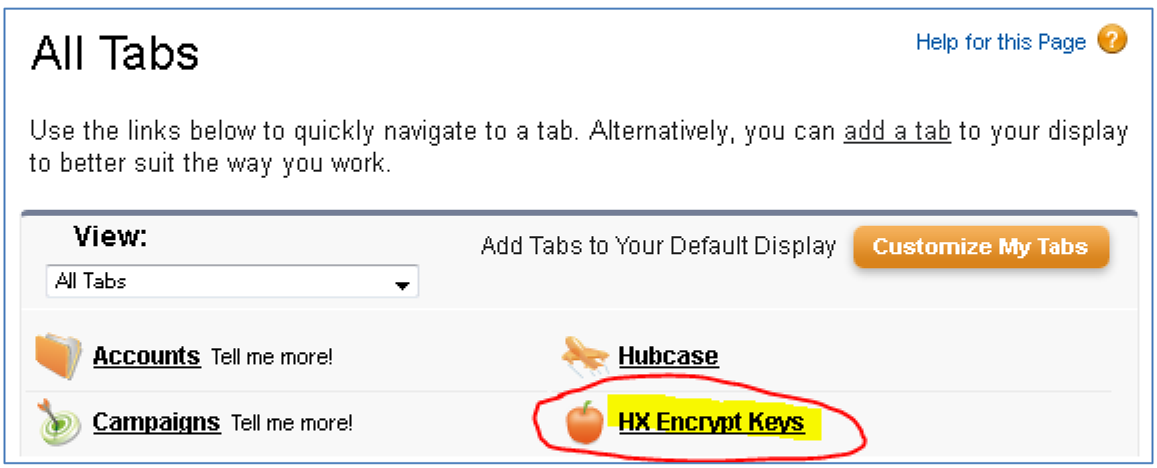


8 Set encryption keys (optional)

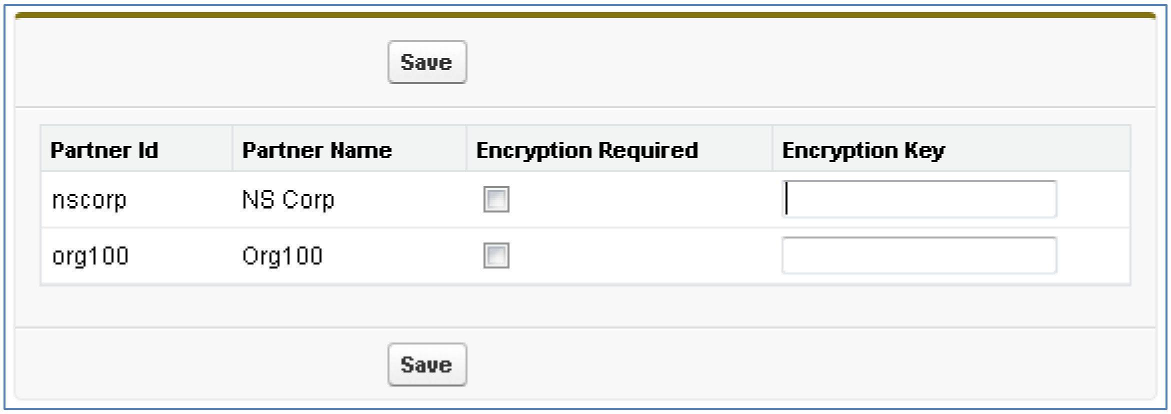
Login to your Salesforce account, and click the "+" at the end of tabs



Select HX "Encrypt Keys".



The “HX Encryption Keys” form is shown below:



Enter the **encryption keys** and check “Encryption Required” for partners you plan to exchange encrypted case data. A key is a password up to 16 characters long.

Encrypted data can only be decrypted by the receiving partner with the same key, and is not visible to any 3rd party including Hubcase. Any key entered must be shared with the partner. So, either you are entering a key the partner has created in their system and shared with you, or, you are entering a new key and you will inform the partner to enter the same in its system. An empty encryption key for any partner means the communication with the partner is visible to Hubcase, but still protected against others.

Contact support@hubcase.com for additional information.

9 Set up inbound message pickup

This step sets up scheduled jobs to periodically fetch inbound B2B messages from Hubcase Exchange.

Schedule the job using developer console (suited for frequent pickups):

- Navigate to Setup > Develop > Apex Classes
- Click on the “Developer Console” button
- Click on “debug > Open Execute Anonymous Window”.
- Paste following code in the console:

```
System.schedule('ScheduledGetDataFromHubQueue  0min', '0  0 * * * ? ', new hx.ScheduledGetDataFromHubQueue());
System.schedule('ScheduledGetDataFromHubQueue 10min', '0 10 * * * ? ', new hx.ScheduledGetDataFromHubQueue());
System.schedule('ScheduledGetDataFromHubQueue 20min', '0 20 * * * ? ', new hx.ScheduledGetDataFromHubQueue());
System.schedule('ScheduledGetDataFromHubQueue 30min', '0 30 * * * ? ', new hx.ScheduledGetDataFromHubQueue());
System.schedule('ScheduledGetDataFromHubQueue 40min', '0 40 * * * ? ', new hx.ScheduledGetDataFromHubQueue());
System.schedule('ScheduledGetDataFromHubQueue 50min', '0 50 * * * ? ', new hx.ScheduledGetDataFromHubQueue());
```

- Click Execute.
- The above schedule jobs to run at the 0th, 10th, 20th, 30th, 40th, and 50th minute of every hour. It runs every 10 minutes, 24 hours a day, and 7 days a week. You could adjust the schedule according to your needs, i.e. frequency and urgency of inbound traffic.

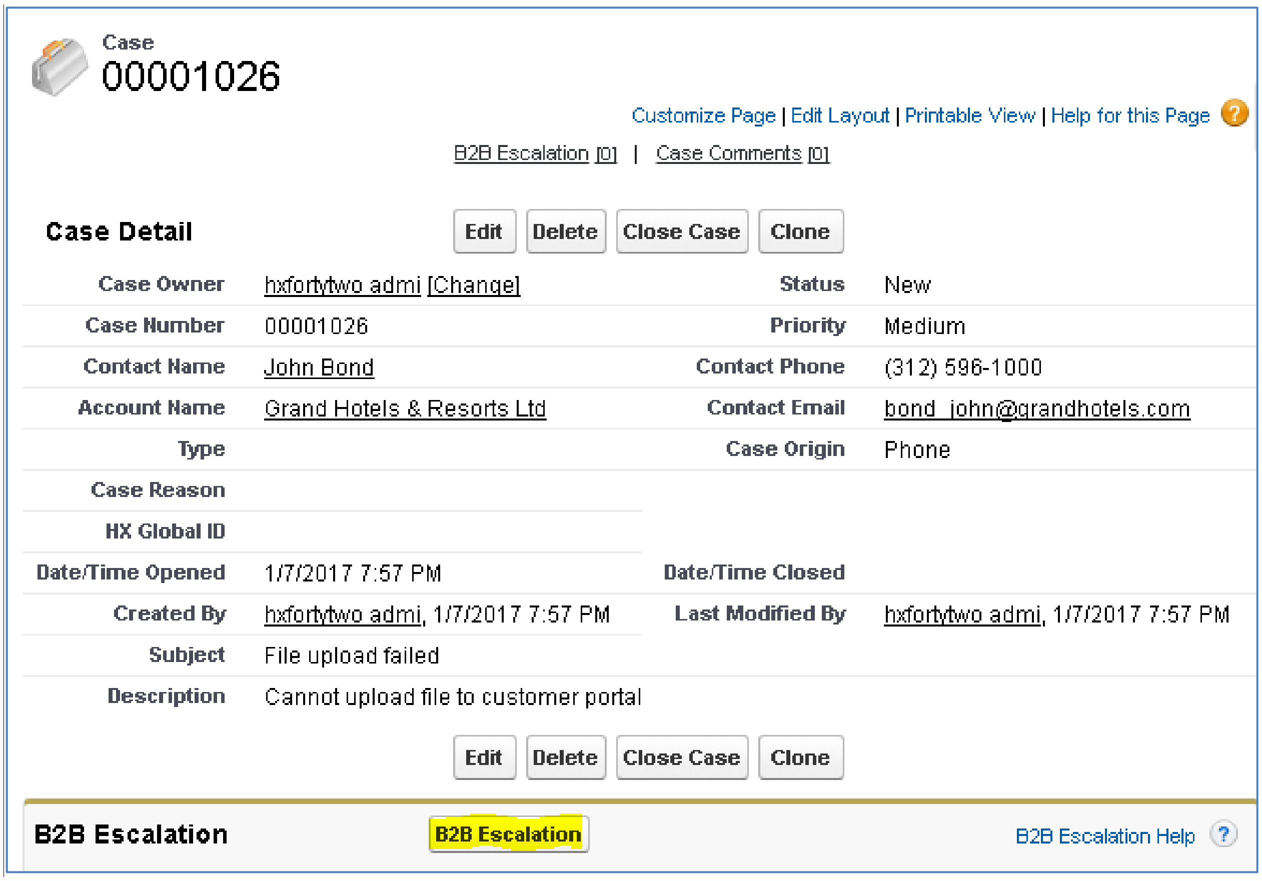
It’s also possible to receive inbound B2B messages in real time, which is discussed in article “KB: Receive B2B inbound message real-time”

10 Test your first B2B escalation

To validate your installation, setup and configuration, set-up a test case and escalate it to a partner organization “ns-partner5”.

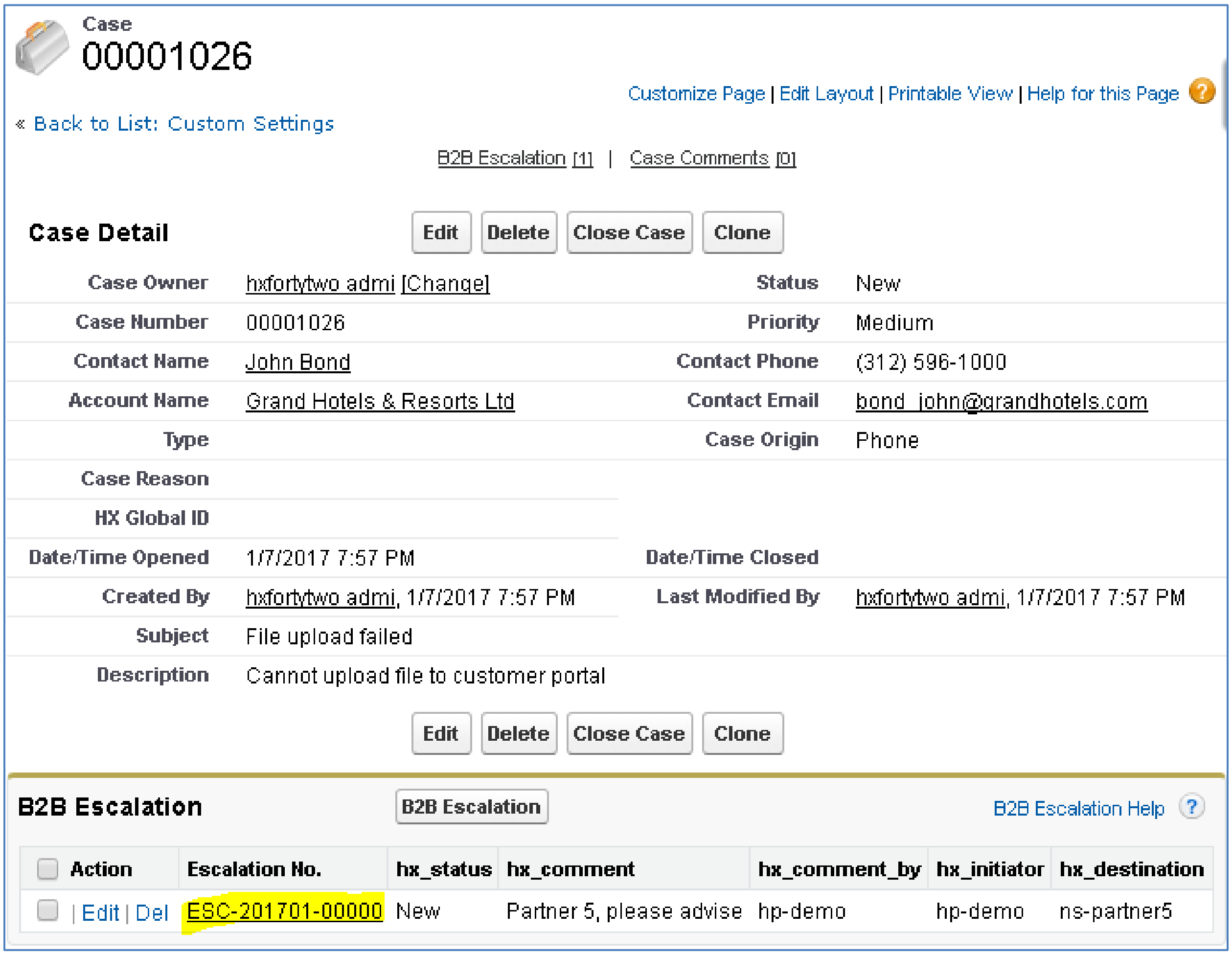
Make sure to confirm that “ns-partner5” accepted your invitation. If it shows up under *Organization > Partners* menu, they have accepted.

Create a test case, and save. Once saved, a “B2B Escalation” button will appear at the bottom of the case form. Click on the button…

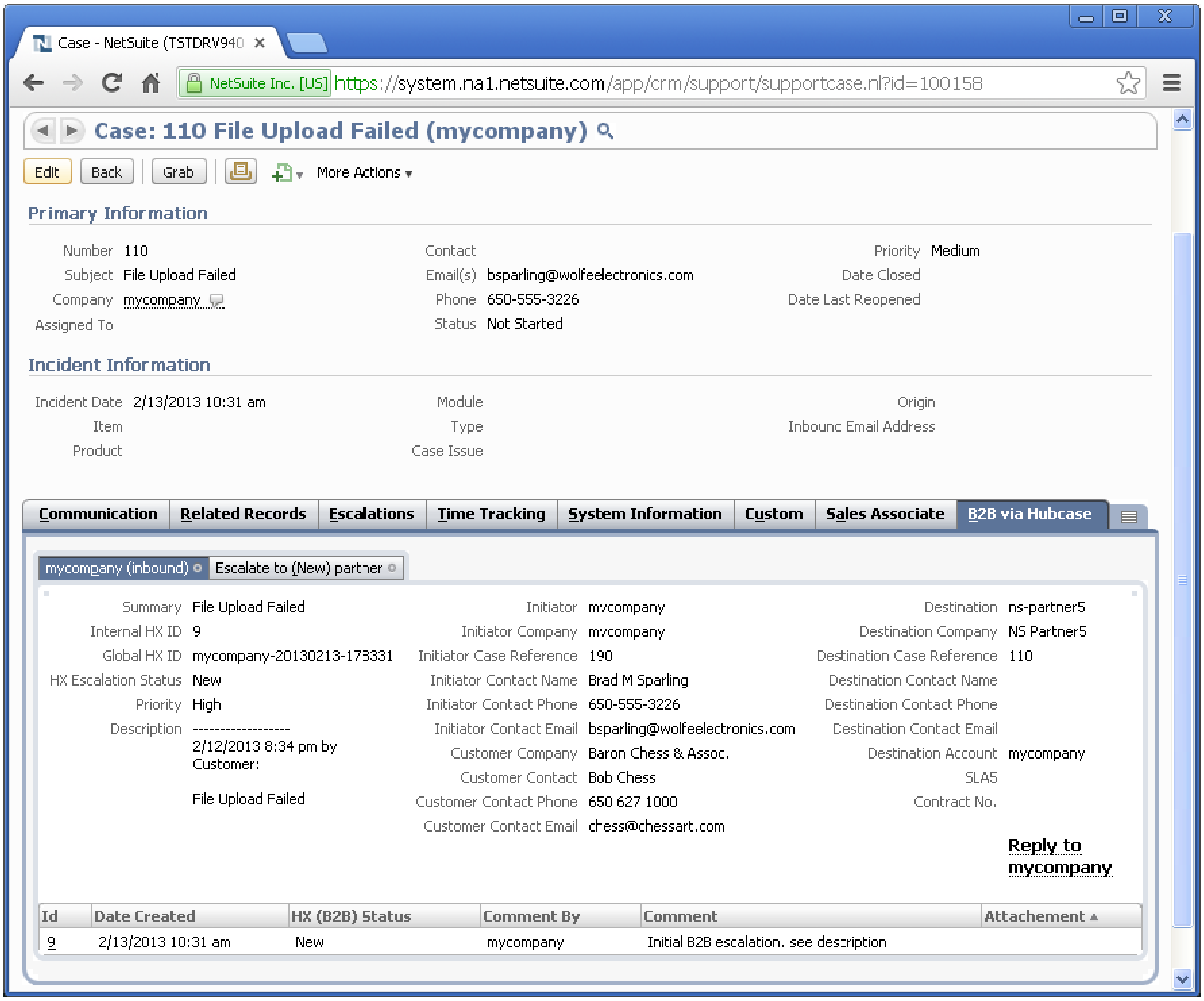


Select a partner (e.g. ns-partner5) that you had setup in your Hubcase portal account) for the "B2B Destination Partner" field, and populate necessary information as shown below, and then click on [Submit].

After [Save], navigate back to the case. You will see a new line of history displayed in the B2B Escalation section. Your configuration worked!


Case
00001026
Customize Page | Edit Layout | Printable View | Help for this Page
« Back to List: Custom Settings
B2B Escalation [1] | Case Comments [0]
Case Detail
Edit Delete Close Case Clone
Case Owner hxfortytwo admi [Change]
Status New
Case Number 00001026
Priority Medium
Contact Name John Bond
Contact Phone (312) 596-1000
Account Name Grand Hotels & Resorts Ltd
Contact Email bond_john@grandhotels.com
Type
Case Origin Phone
Case Reason
HX Global ID
Date/Time Opened 1/7/2017 7:57 PM
Date/Time Closed
Created By hxfortytwo admi, 1/7/2017 7:57 PM
Last Modified By hxfortytwo admi, 1/7/2017 7:57 PM
Subject File upload failed
Description Cannot upload file to customer portal
Edit Delete Close Case Clone
B2B Escalation
B2B Escalation
B2B Escalation Help
Action Escalation No. hx_status hx_comment hx_comment_by hx_initiator hx_destination
| Edit | Del ESC-201701-00000 New Partner 5, please advise hp-demo hp-demo ns-partner5

What happens to your partner (e.g. nspartner5)? Your partner (ns-partner5) has received an inbound support case as shown below because of your escalation. In this example, ns-partner5 is using NetSuite to manage its cases as shown below:



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

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

11 Appendix Useful Links

11.1 This doc

http://www.hubcase.com/uploads/download/Hubcase_for_salesforce_installation_instruction.pdf

11.2 Manually configure B2B permissions

http://www.hubcase.com/uploads/download/KB-manually-configure-B2B-permissions.pdf