



# **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](mailto:support@hubcase.com) for assistance

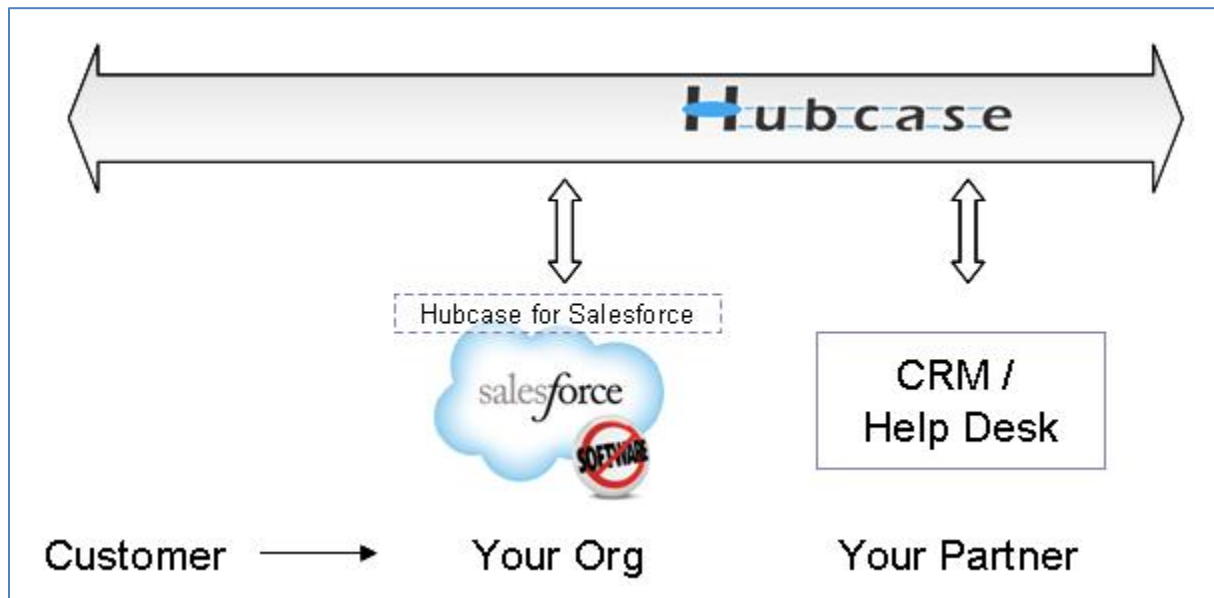
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## Overview

**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.

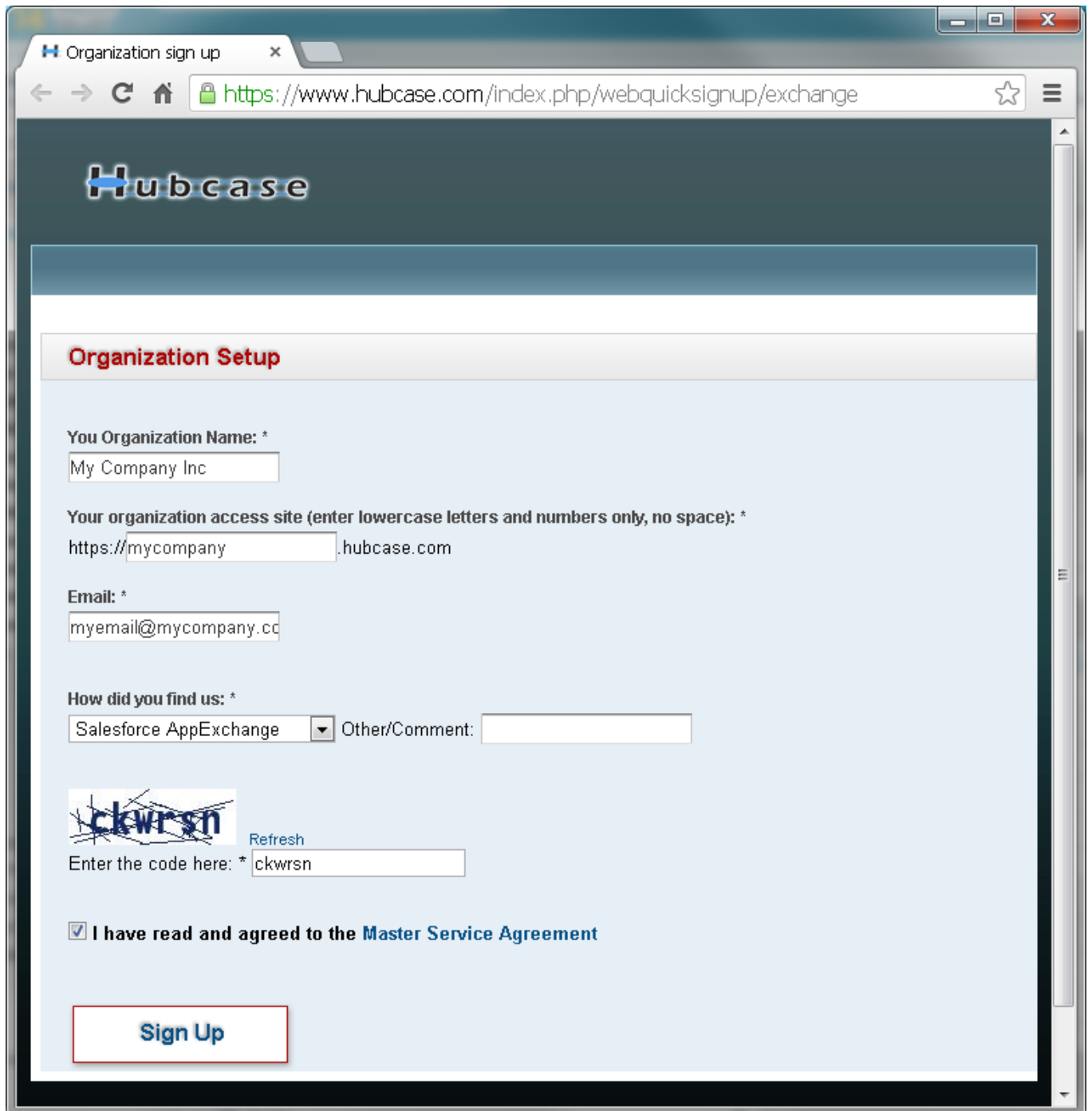
Please note that the installation and configuration only need to be done once by your system administrator, and only occasional maintenance is needed. Additional information can be found at [http://www.hubcase.com/exchange\\_salesforce.html](http://www.hubcase.com/exchange_salesforce.html)

# 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:



The screenshot shows a web browser window with the title "Organization sign up" and the URL "https://www.hubcase.com/index.php/webquicksignup/exchange". The page features the Hubcase logo at the top. Below the logo is a section titled "Organization Setup" with a red header. The form contains the following fields and elements:

- You Organization Name: \*** Input field containing "My Company Inc".
- Your organization access site (enter lowercase letters and numbers only, no space): \*** Input field containing "https://mycompany" followed by ".hubcase.com".
- Email: \*** Input field containing "myemail@mycompany.cc".
- How did you find us: \*** A dropdown menu with "Salesforce AppExchange" selected and an "Other/Comment:" input field.
- A CAPTCHA image showing the code "ckwrsn" with a "Refresh" link.
- Enter the code here: \*** Input field containing "ckwrsn".
- I have read and agreed to the Master Service Agreement**
- A red-bordered "Sign Up" button.

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

### Organization Signup Activation

**You Organization Name: \***

**You Organization Access Site:**  
.hubcase.com  
You will be accessing your hubcase using the above.

**Your user name is your email, please set up your password here**

**Password: \***

**Re-type Password: \***

**Your First Name: \***

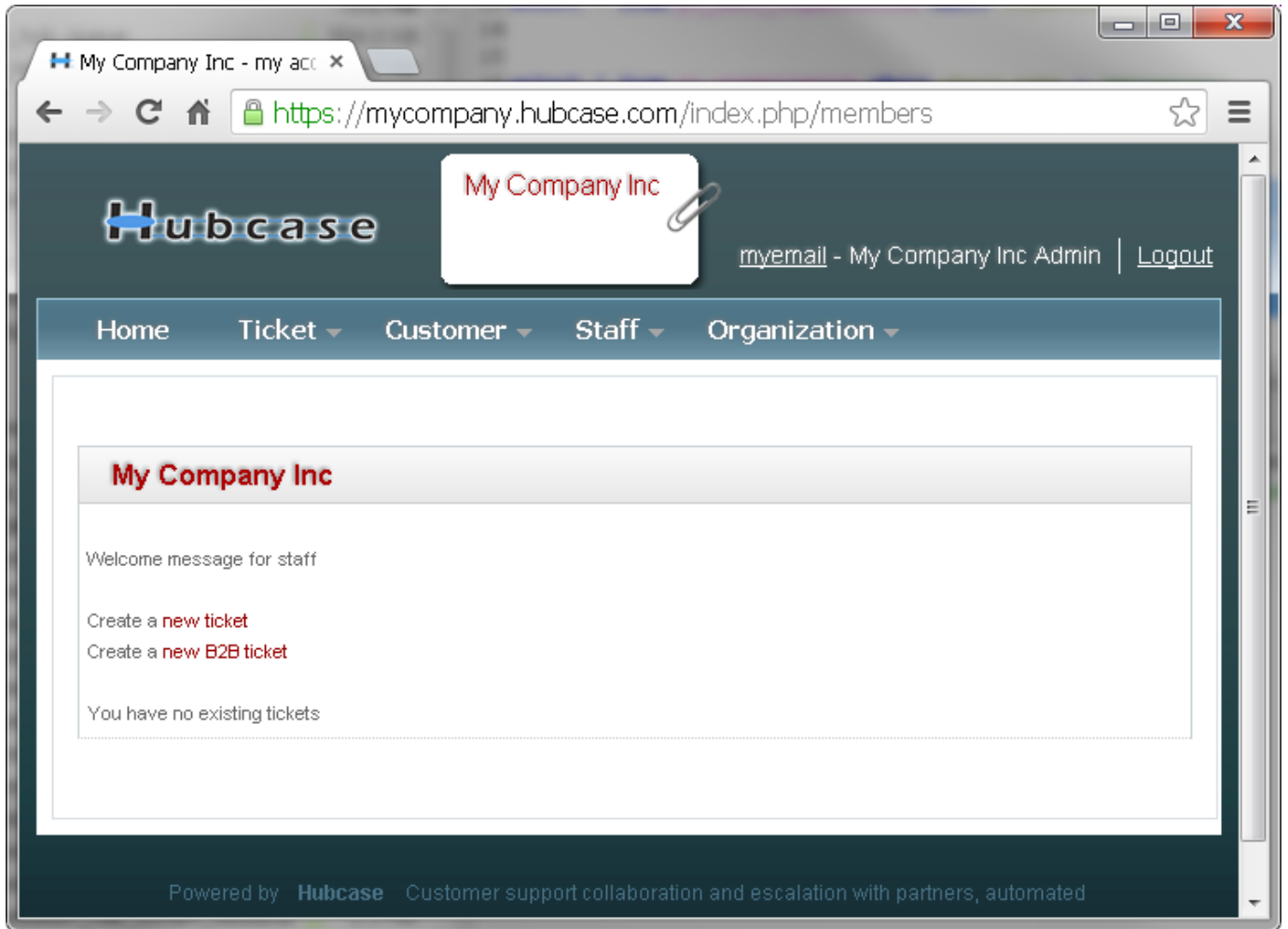
**Your Last Name: \***

**Your Phone Number: \***

**The primary system:**  
  Other/Comment:

**Activate**

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].

Home Ticket Customer Staff Organization

My Organization  
Manage  
Partners  
Custom Fields

**My Company Inc**

Organization name My Company Inc

Your org identification mycompany

!!! WARNING !!! Change org identification will change your access web site. Your current site is <https://mycompany.hubcase.com>

Add / update your company logo Choose File No file chosen

Check here if your org has a CRM/Ticketing system (e.g. Salesforce, NetSuite, Dynamics CRM) already

Contact Info Connector Settings

The primary, in-house/existing system Salesforce Other/Comment:

Notification URL <https://hubcase-demo-c>  
Used to trigger your in-house system to pick up escalation messages, see configuration guide for your specific system.

Keep transit data in Hubcase for auditing and metrics

Use Hubcase as a standby

Number of concurrent users 3

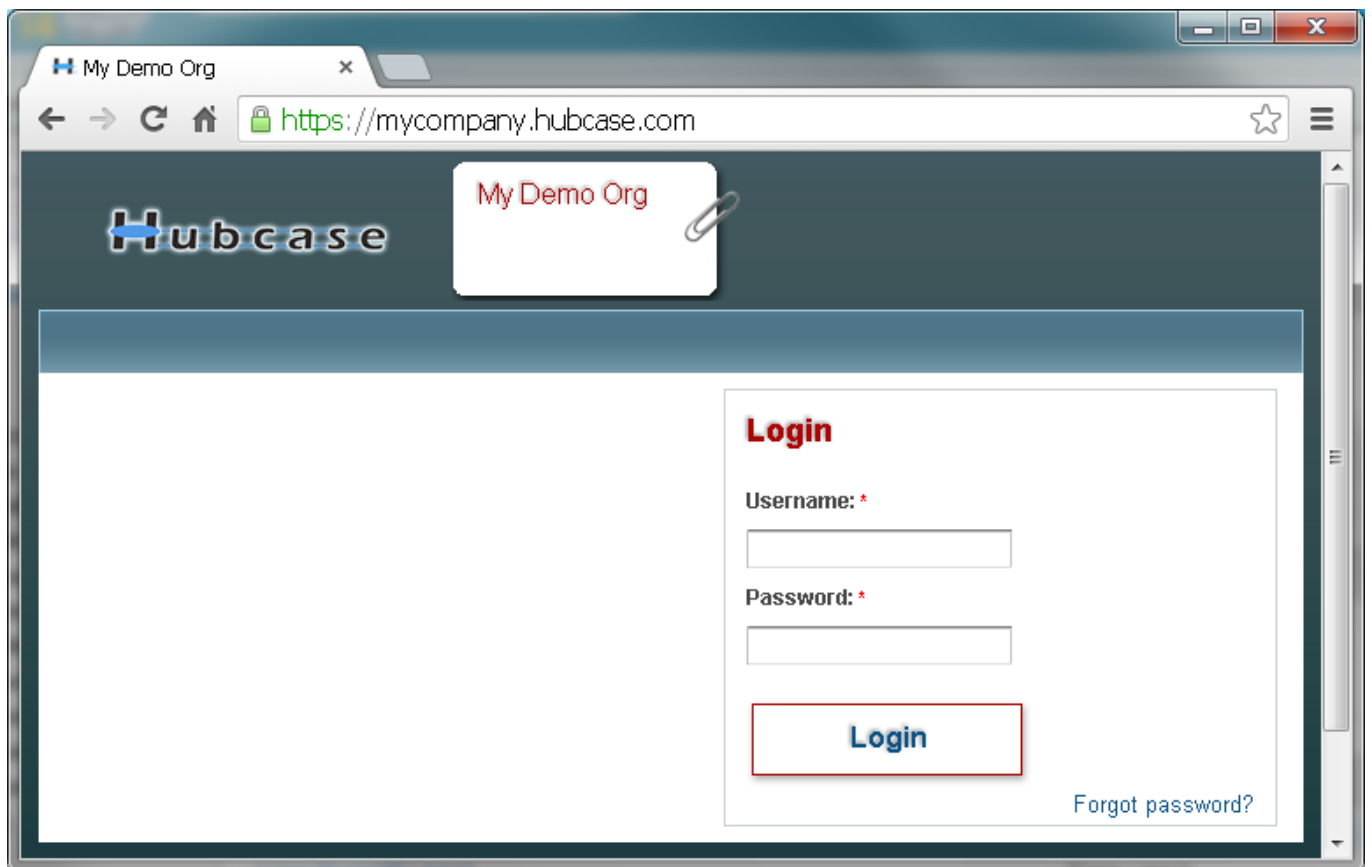
Update

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](mailto: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:

Home Staff Organization

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

con Search

	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]. 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.

Home Staff Organization

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

con Search

### 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.

	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. 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”.

Home Cases +

Search All Setup... *i* *Q*

[Expand All](#) | [Collapse All](#)

**Force.com Home**

**Administer**

- Manage Users**
  - Users
  - Mass Email Users
  - Roles
  - Permission Sets
- [Profiles](#)

### Clone Profile

Enter the name of the new profile.

**You must select an existing profile to clone from.**

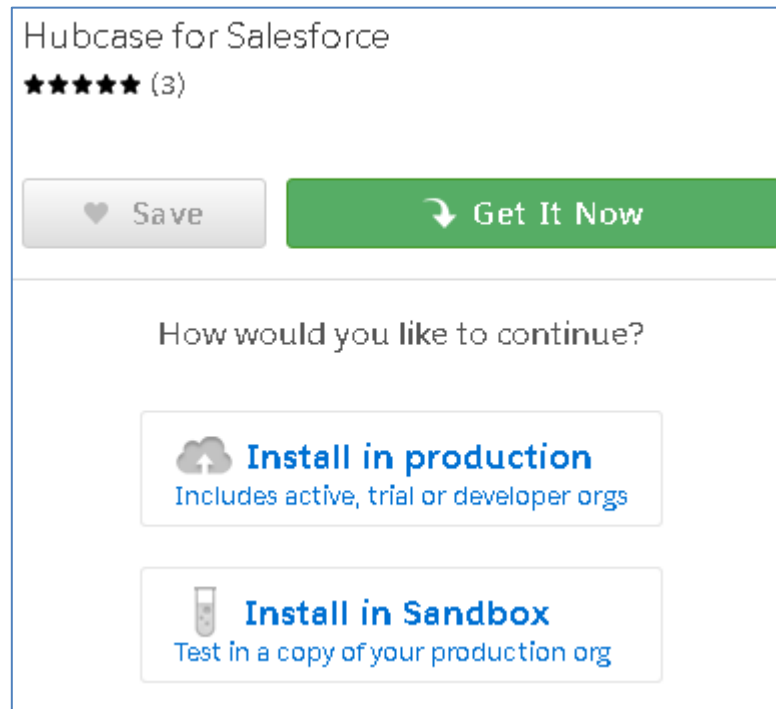
Existing Profile	Custom: Support Profile
User License	Salesforce
Profile Name	<input type="text" value="B2B Support Profile"/>

## 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



This app does not list support for your edition of Salesforce. You can continue installation, but it may fail later in the process.



Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

#### WHAT YOU ARE INSTALLING

PACKAGE

**Hubcase for Salesforce**

VERSION

**Hubcase for Salesforce (Winter 2017 / 4.1.0)**

SUBSCRIPTION

**Free**

DURATION

**Does Not Expire**

NUMBER OF SUBSCRIBERS

**Site-wide**

#### WHERE YOU ARE INSTALLING

ORGANIZATION

**hx42**

EDITION

USER NAME

**hx42@hubcase.com**

I have read and agree to the [terms and conditions](#) .

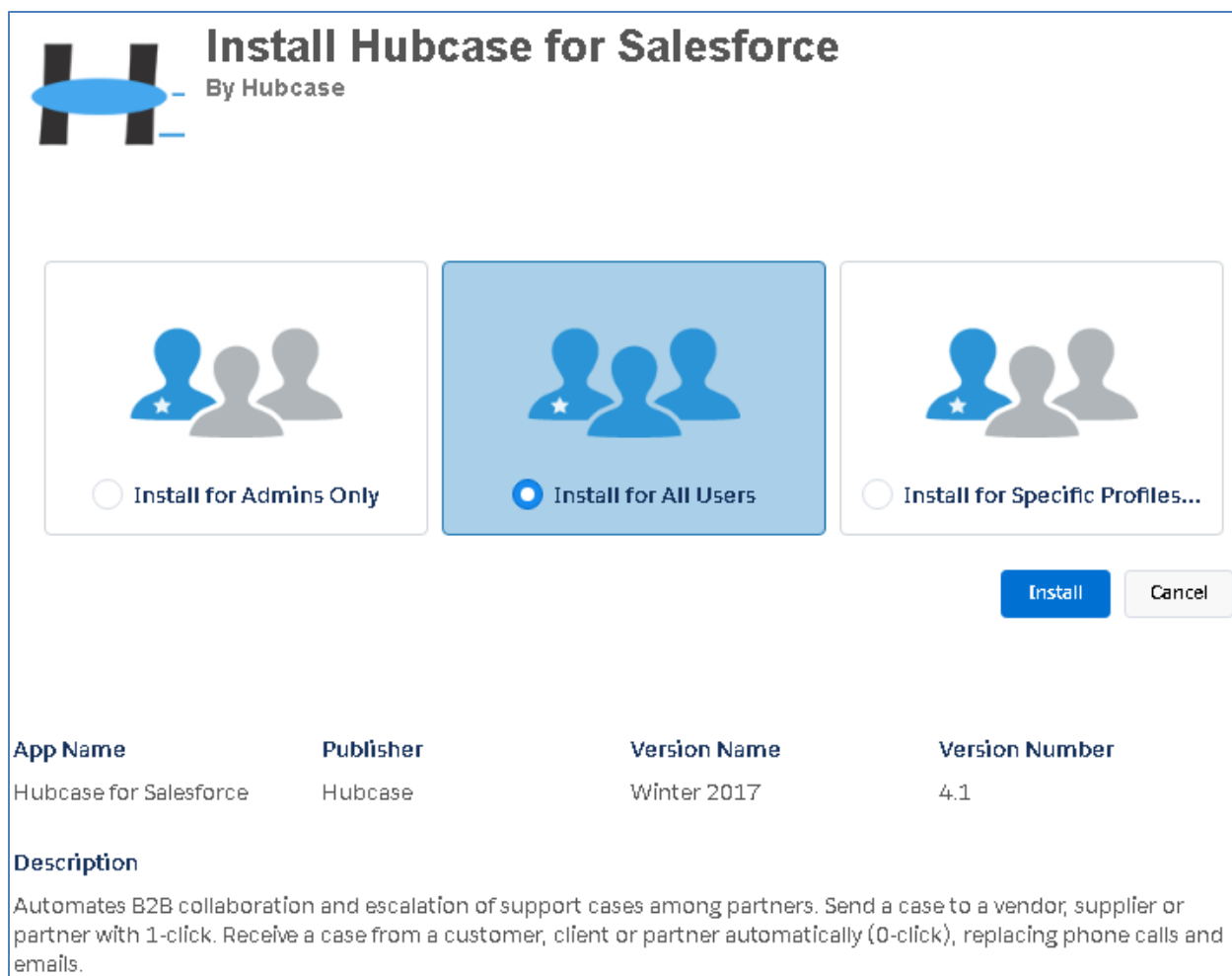
[Cancel Install](#) | [Back to previous step](#)

**Confirm and Install!**

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...”



**Install Hubcase for Salesforce**  
By Hubcase

Install for Admins Only
  Install for All Users
  Install for Specific Profiles...

App Name	Publisher	Version Name	Version Number
Hubcase for Salesforce	Hubcase	Winter 2017	4.1

**Description**

Automates B2B collaboration and escalation of support cases among partners. Send a case to a vendor, supplier or partner with 1-click. Receive a case from a customer, client or partner automatically (0-click), replacing phone calls and emails.

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.



Standard profiles (including the Read-Only profile) don't receive access to any in custom objects. Because permissions are not editable for standard profiles, you clone your profile to grant access.

No Access

Profile	Access Level
System Administrator	Full Access (Your profile must have full access)
Service Cloud	No Access
Customer Portal Manager	No Access
Authenticated Website	No Access
High Volume Customer Portal	No Access
Partner User	No Access
Standard Platform User	No Access
Analytics Cloud Integration User	No Access
Analytics Cloud Security User	No Access
Authenticated Website	No Access
<b>B2B Support Profile</b>	<b>B2B Escalation User</b>

After you have made the choice of "Install for...", click [Install] to complete the installation

**Install Hubcase for Salesforce**  
By Hubcase

**i** Installation Complete!

Done

App Name	Publisher	Version Name	Version Number
Hubcase for Salesforce	Hubcase	Winter 2017	4.1

**Description**  
Automates B2B collaboration and escalation of support cases among partners. Send a case to a vendor, supplier or partner with 1-click. Receive a case from a customer, client or partner automatically (0-click), replacing phone calls and emails.

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.

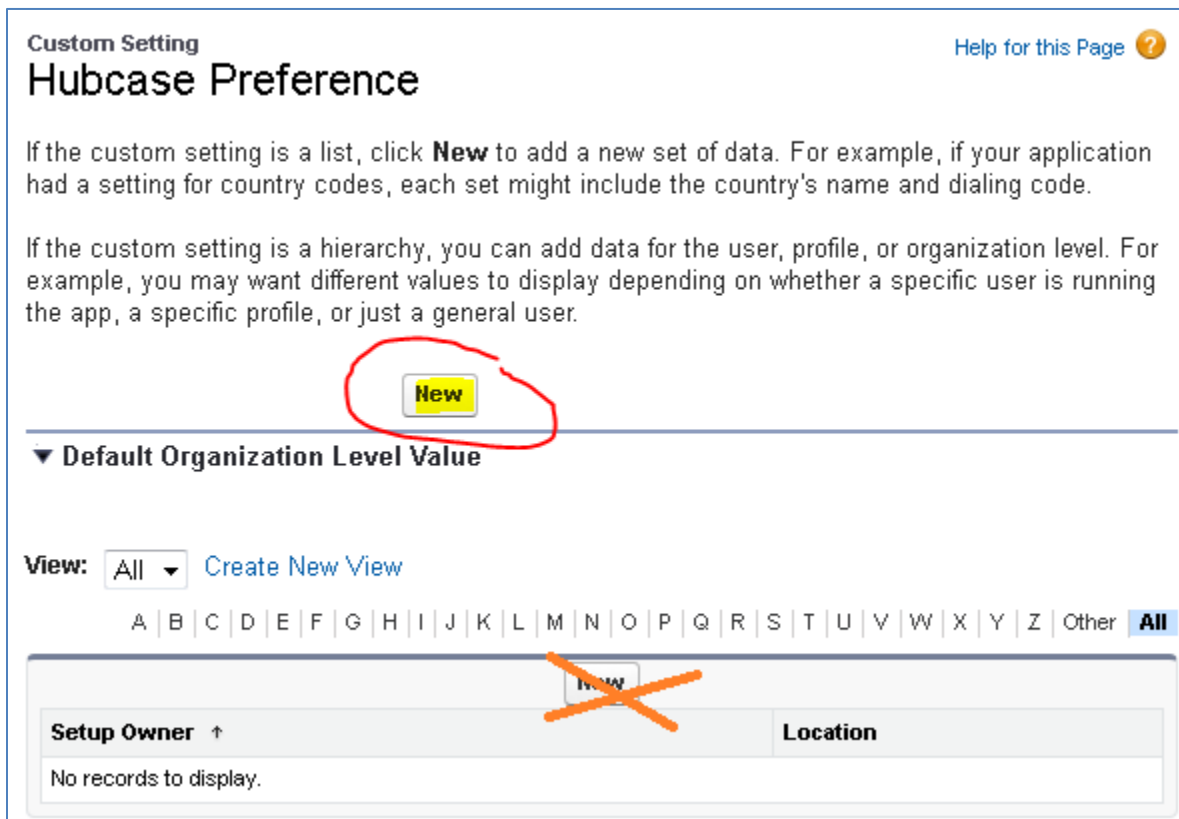
Login to your Salesforce account, and navigate to Setup > Develop > Custom Settings.

Click Manage in front of “Hubcase Preference”.



Action	Label ↑	Visibility	Settings Type
Manage	Hubcase Preference	Public	Hierarchy

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



Custom Setting Help for this Page ?

## Hubcase Preference

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

**New**

---

▼ Default Organization Level Value

View: All ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

Setup Owner ↑	Location
No records to display.	

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

## Hubcase Preference Edit

Provide values for the fields you created. This data is cached with the application.

**Edit Hubcase Preference**

### Hubcase Preference Information

**Location**

**Endpoint**

**Match Existing Account**

**Match Existing Case**

**Org Id**

**Password**

**UserName**

- 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*

### Remote Site Edit

[Help for this Page](#) ?

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

**Remote Site Edit**

Remote Site Name	<input type="text" value="myhubcase"/>
Remote Site URL	<input type="text" value="https://mycompany.hubcase.com"/>
Disable Protocol Security	<input type="checkbox"/> <a href="#">i</a>
Description	<input type="text"/>
Active	<input checked="" type="checkbox"/>

## 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				
		<a href="#">New</a>	<a href="#">Page Layout Assignment</a>	
Action	Page Layout Name	Installed Package	Created By	Modified By
<a href="#">Edit</a>   <a href="#">Del</a> 	Case (HX Escalation) Layout	<a href="#">Hubcase for Salesforce</a>	<a href="#">hxfortytwo admj,</a> 1/7/2017 7:38 PM	<a href="#">hxfortytwo admj,</a> 1/7/2017 7:38 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Marketing) Layout		<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM	<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Sales) Layout		<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM	<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Support) Layout		<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM	<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM
<a href="#">Edit</a>   <a href="#">Del</a>	Case Layout		<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM	<a href="#">hxfortytwo admj,</a> 11/9/2016 7:47 PM

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

Page Layout Assignment Help for this Page ?

## Case

The table below shows the page layout assignments for different profiles.

Edit Assignment

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.

Edit Page Layout Assignment Help for this Page ?

## Case

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

**Page Layout To Use:** Case (HX Escalation) Layout ▼ 3 Selected 3  
Changed

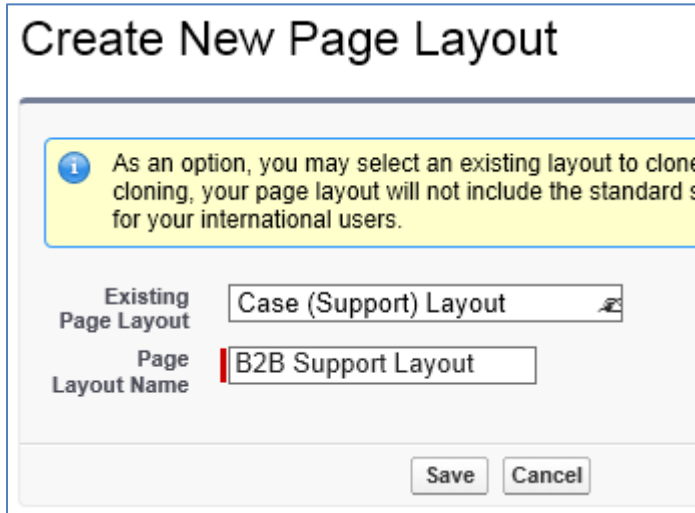
Profiles	Page Layout
Contract Manager	Case (Support) Layout
Custom: Marketing Profile	Case (Support) Layout
Custom: Sales Profile	Case (Support) Layout
Custom: Support Profile	Case (HX Escalation) Layout
Customer Portal Manager Custom	Case (Support) Layout
Customer Portal Manager Standard	Case (Support) Layout
Gold Partner User	Case (Support) Layout
High Volume Customer Portal	Case (Support) Layout
Marketing User	Case (Support) Layout
Read Only	Case (Support) Layout
Solution Manager	Case (HX Escalation) Layout
Standard User	Case (Support) Layout
System Administrator	Case (HX Escalation) Layout

Save Cancel

Click [Save].

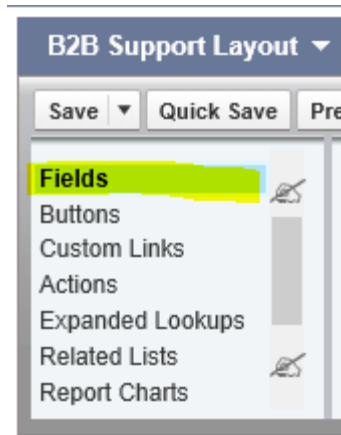
## 7.2 Create a new Layout and edit the new layout

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



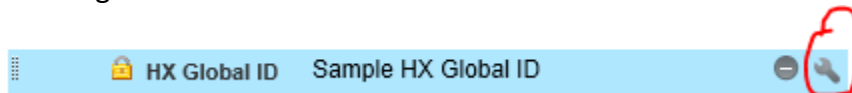
The screenshot shows a dialog box titled "Create New Page Layout". At the top, there is an information icon and a message: "As an option, you may select an existing layout to clone cloning, your page layout will not include the standard s for your international users." Below this, there are two input fields. The first is labeled "Existing Page Layout" and contains the text "Case (Support) Layout". The second is labeled "Page Layout Name" and contains the text "B2B Support Layout". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

Edit the new "B2B Support Layout"

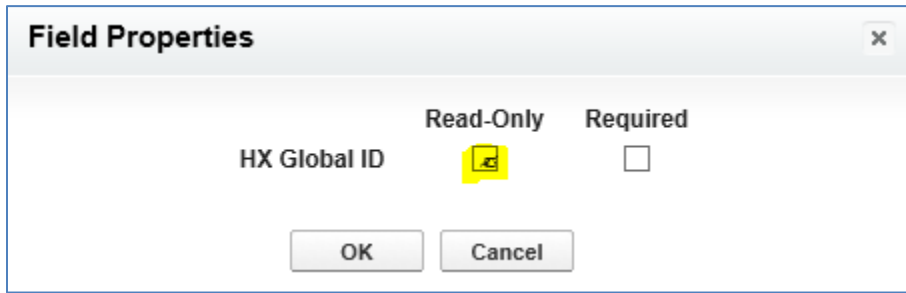


Select Fields at the top left pane,

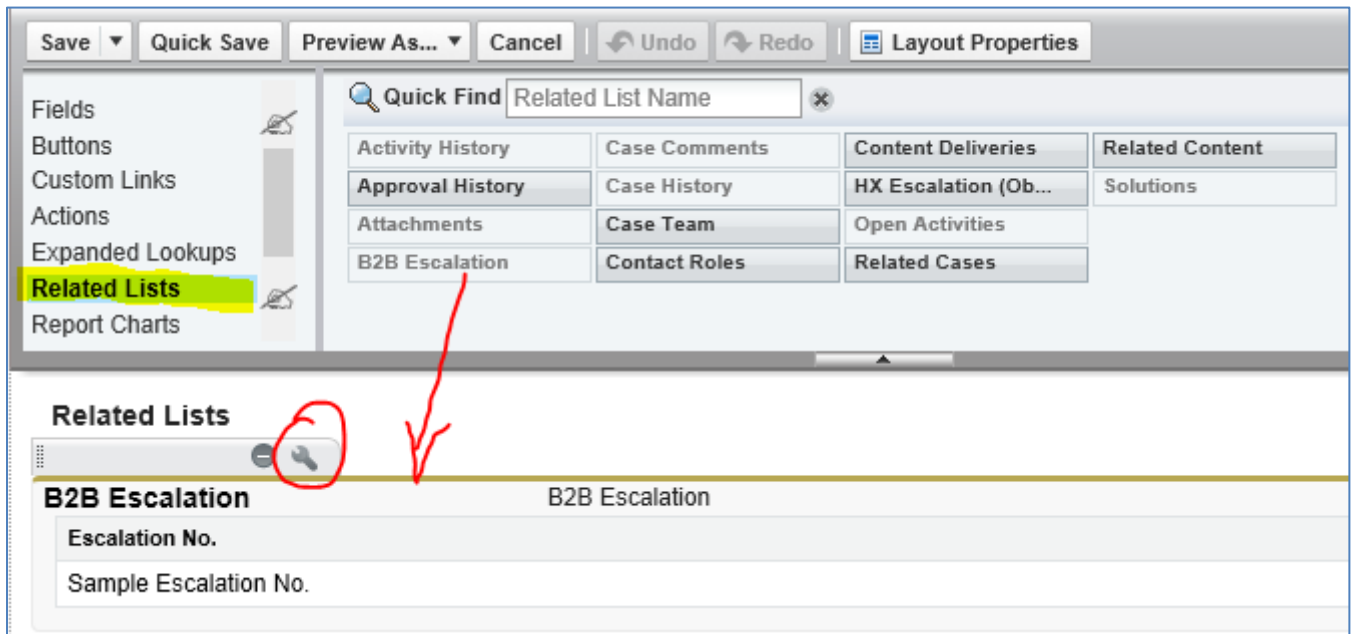
and drag "HX Global ID" to the Case Header area. Then hover over the field, and click on configure.



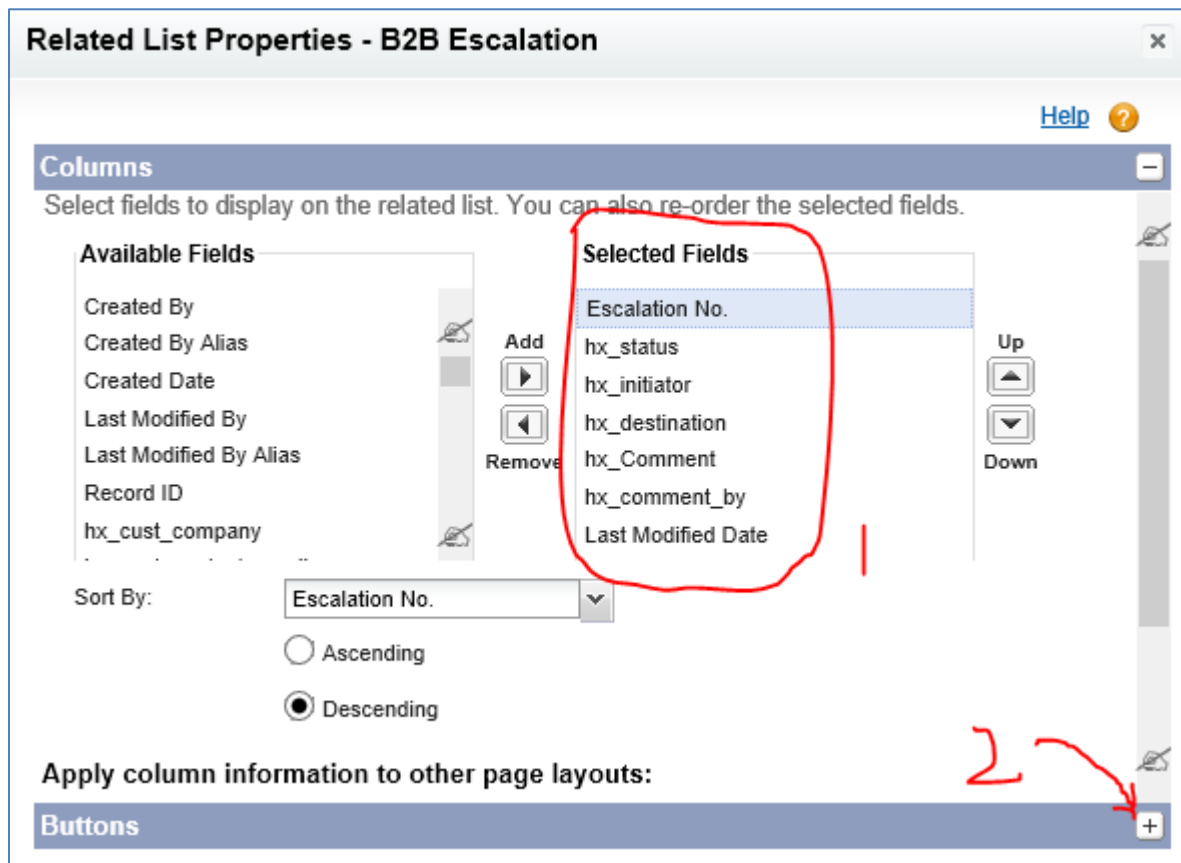
Make sure "Read-Only" is checked:



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:



**Related List Properties - B2B Escalation** Help ?

Columns +

Buttons -

**Standard Buttons:**  
Select standard buttons to display on the related list.

New

**Custom Buttons:**  
Select custom buttons to display on the related list. You can also re-order the selected buttons.

Available Buttons

**Selected Buttons**

B2B Escalation

Add  
Remove

Up  
Down

OK Cancel Revert to Defaults

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

Now edit Case Page Layout Assignment.

## Case Page Layout

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 is used for each profile.

**Case Page Layouts** New Page Layout Assignment

Action	Page Layout Name	Installed Package	Created By
<a href="#">Edit</a>   <a href="#">Del</a>	B2B Support Layout		<a href="#">hxeleven admin.</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Case (HX Escalation) Layout	Hubcase for Salesforce	<a href="#">hxeleven admin.</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Marketing) Layout		<a href="#">hxeleven admin.</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Sales) Layout		<a href="#">hxeleven admin.</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Case (Support) Layout		<a href="#">hxeleven admin.</a>
<a href="#">Edit</a>   <a href="#">Del</a>	Case Layout		<a href="#">hxeleven admin.</a>

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

Edit Page Layout Assignment [Help for this Page](#)

## Case

The table below shows the page layout assignments for different profiles. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use: B2B Support Layout 1 Selected 1 Changed

Profiles	Page Layout
B2B Support Profile	<span style="background-color: yellow;">B2B Support Layout</span>
Contract Manager	Case (Support) Layout
Custom: Marketing Profile	Case (Support) Layout

Assign user to the new profile

User Edit  
**hx11-user1**

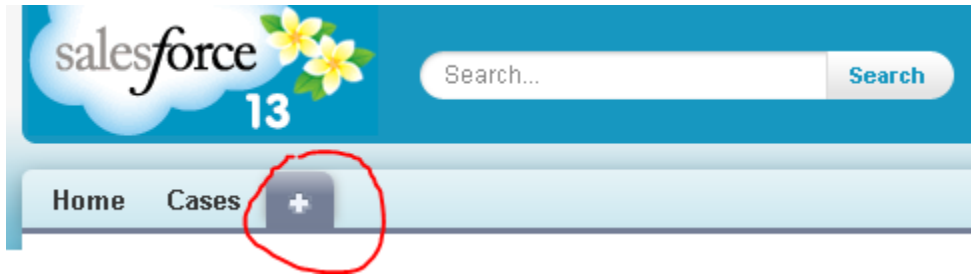
**User Edit**

**General Information**

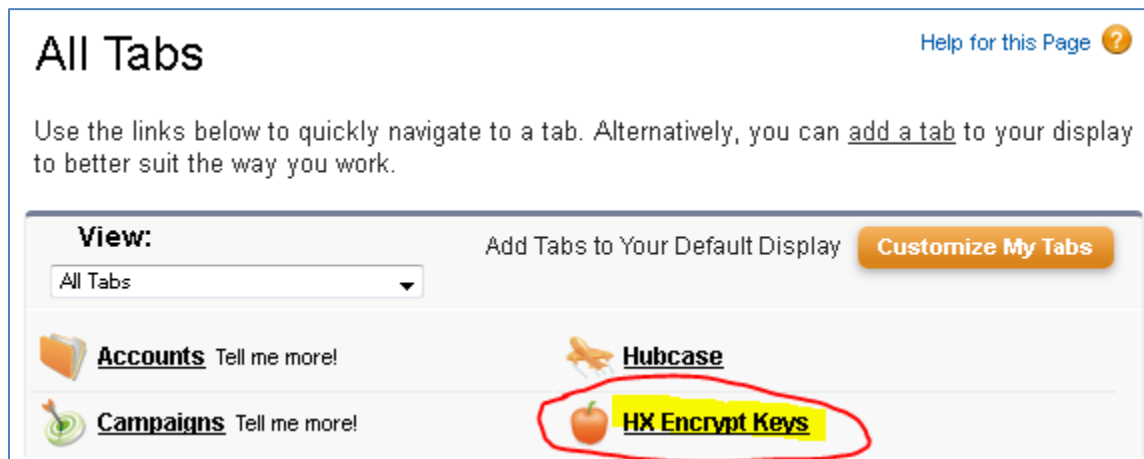
First Name	<input type="text"/>	Role	<input type="text" value="&lt;None Specified&gt;"/>
Last Name	<input type="text" value="hx11-user1"/>	User License	<input type="text" value="Salesforce"/>
Alias	<input type="text" value="hx11"/>	Profile	<input type="text" value="B2B Support Profile"/>
Email	<input type="text" value="hx11-user1@hubcase.co"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text" value="hx11-user1@hubcase.co"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text" value="hx11-user1"/>	Offline User	<input type="checkbox"/>

## 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:

Partner Id	Partner Name	Encryption Required	Encryption Key
nscorp	NS Corp	<input type="checkbox"/>	<input type="text"/>
org100	Org100	<input type="checkbox"/>	<input type="text"/>

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](mailto: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...

 **Case**  
**00001026**


[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) 

[B2B Escalation \[0\]](#) | [Case Comments \[0\]](#)

**Case Detail** [Edit](#) [Delete](#) [Close Case](#) [Clone](#)

<b>Case Owner</b>	<a href="#">hxfortytwo admj</a> <a href="#">[Change]</a>	<b>Status</b>	New
<b>Case Number</b>	00001026	<b>Priority</b>	Medium
<b>Contact Name</b>	<a href="#">John Bond</a>	<b>Contact Phone</b>	(312) 596-1000
<b>Account Name</b>	<a href="#">Grand Hotels &amp; Resorts Ltd</a>	<b>Contact Email</b>	<a href="mailto:bond_john@grandhotels.com">bond_john@grandhotels.com</a>
<b>Type</b>		<b>Case Origin</b>	Phone
<b>Case Reason</b>			
<b>HX Global ID</b>			
<b>Date/Time Opened</b>	1/7/2017 7:57 PM	<b>Date/Time Closed</b>	
<b>Created By</b>	<a href="#">hxfortytwo admj</a> , 1/7/2017 7:57 PM	<b>Last Modified By</b>	<a href="#">hxfortytwo admj</a> , 1/7/2017 7:57 PM
<b>Subject</b>	File upload failed		
<b>Description</b>	Cannot upload file to customer portal		

[Edit](#) [Delete](#) [Close Case](#) [Clone](#)

**B2B Escalation** [B2B Escalation](#) [B2B Escalation Help](#) 

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].

<input type="button" value="Save"/>		<input type="button" value="Cancel"/>
B2B Initiating Partner	hp-demo	
* B2B Destination Partner	ns-partner5(NS Partner5	▼ Disable
	<a href="#">Partner not listed?</a>	
Initiator Company	HP Demo	
Initiator Case Reference	00001026	
* Initiator Contact Name	hxfortytwo admi	
* Initiator Contact Phone	555-1212	
* Initiator Contact Email	myname@mycompany.com	
Destination Company	NS Partner5	
Destination Case Reference	<input type="text"/>	
Destination Contact Name	<input type="text"/>	
Destination Contact Phone	<input type="text"/>	
Destination Contact Email	<input type="text"/>	
* Destination Account	HP Demo	
Customer Company	Grand Hotels & Resorts Ltd	
Customer Contact	John Bond	
Customer Contact Phone	(312) 506-1000	



Customer Contact Phone	(312) 596-1000
Customer Contact Email	bond_john@grandhotels.com
Case	00001026
Global HX ID	
B2B Escalation Status	New ▼
B2B Escalation Priority	Medium
File (1.5MB, or 0.5MB encrypted)	Choose File No file chosen
<b>Custom Fields</b>	
District	Manhattan
Postal Code	10001
Tax State	NY
Tax County	New York
Tax City	New York
<b>Summary</b>	
* Summary	File upload failed
* Description	Cannot upload file to customer portal
* Comment	Partner 5, please advise
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

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

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[« Back to List: Custom Settings](#)

[B2B Escalation \[1\]](#) | [Case Comments \[0\]](#)

## Case Detail

[Edit](#) [Delete](#) [Close Case](#) [Clone](#)

<b>Case Owner</b>	<a href="#">hxfortytwo_admi</a> <a href="#">[Change]</a>	<b>Status</b>	New
<b>Case Number</b>	00001026	<b>Priority</b>	Medium
<b>Contact Name</b>	<a href="#">John Bond</a>	<b>Contact Phone</b>	(312) 596-1000
<b>Account Name</b>	<a href="#">Grand Hotels &amp; Resorts Ltd</a>	<b>Contact Email</b>	<a href="#">bond_john@grandhotels.com</a>
<b>Type</b>		<b>Case Origin</b>	Phone
<b>Case Reason</b>			
<b>HX Global ID</b>			
<b>Date/Time Opened</b>	1/7/2017 7:57 PM	<b>Date/Time Closed</b>	
<b>Created By</b>	<a href="#">hxfortytwo_admi</a> , 1/7/2017 7:57 PM	<b>Last Modified By</b>	<a href="#">hxfortytwo_admi</a> , 1/7/2017 7:57 PM
<b>Subject</b>	File upload failed		
<b>Description</b>	Cannot upload file to customer portal		

[Edit](#) [Delete](#) [Close Case](#) [Clone](#)

## B2B Escalation

[B2B Escalation](#)

[B2B Escalation Help](#)

<input type="checkbox"/> Action	Escalation No.	hx_status	hx_comment	hx_comment_by	hx_initiator	hx_destination
<input type="checkbox"/>   <a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">ESC-201701-00000</a>	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:

The screenshot shows a NetSuite CRM interface for a support case. The browser address bar indicates the URL: <https://system.na1.netsuite.com/app/crm/support/supportcase.nl?id=100158>. The case title is "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 Log:**

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	SLAS	
		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 Salesforce.

If you have any questions, please email [support@hubcase.com](mailto:support@hubcase.com)

## **11 Appendix Useful Links**

### **11.1 *This doc***

[http://www.hubcase.com/uploads/download/Hubcase\\_for\\_salesforce\\_installation\\_instruction.pdf](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>