

The Jive logo consists of the word "jive" in a lowercase, bold, sans-serif font. The letter "j" has a distinctive hook that extends downwards and to the left.

work better together™

**for Salesforce Question-to-Case Connector**

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# Cloud Help for Community Managers

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## What is the Salesforce Question-to-Case Connector

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The Salesforce Question-to-Case Connector syncs questions created in Jive to Salesforce org cases. This allows Salesforce agents to comment directly in the Salesforce case and the comment syncs back to Jive as a reply to the question or discussion.

Following the integration users can:

- Create questions that sync to Salesforce org as new cases
- Reply to discussion that sync to Salesforce.com as a case's comment
- Collaborate on attachments to Jive discussions in Salesforce.com cases

In addition, Salesforce org agents can :

Write comments to cases, mark them as correct answer. The comments sync back to the Jive question as replies.

## Setting up the Salesforce Question-to-Case Connector

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To set up the Salesforce Question-to-Case connector, you need to install the Question-to-Case package, create a connected app and then assign a custom Question-to-Case page layout (available after installing the package).

Following the tasks on Salesforce org, you install and configure the Salesforce Question-to-Case add-on on Jive.

### System Requirements

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The Salesforce Question-to-Case Connector works with the latest version of the Jive Cloud release. You will need a Salesforce organization.

To install and configure the connector:

- Jive-x or Jive-n Cloud
- Community manager rights to your Jive Community
- A Salesforce org account to be used as a new service user, with permission to set up a Connected App

To use the connector:

- Jive-x or Jive-n cloud
- A user account for your Jive community (with access to the Jive places that the community manager specified when configuring the Salesforce Connector)

### Installing the Salesforce Question-to-Case Package

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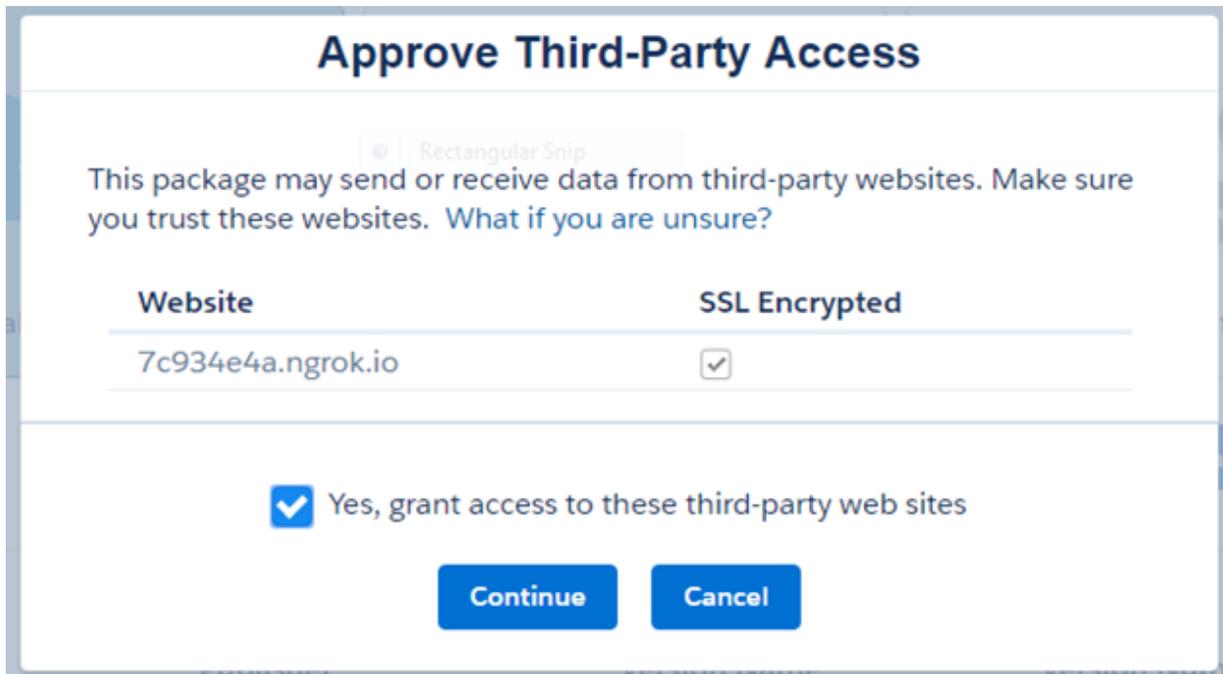
Install the Salesforce Question-to-Case package to Salesforce org.

1. Log on to Salesforce.com and in the new tab, paste the Salesforce package link:

Salesforce Managed package link: <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t28000000PJxX>

2. Select **Install for Admins Only** and click **Install**.

You can install other packages depending on your business needs.



3. Select the option **Yes, grant access to these third-party web sites** and click **Continue**.



## Creating Connected App

After creating the app, Consumer Key and Consumer Secret are generated. You use these keys to connect the Question-to-Case Connector add-on to your Salesforce org.

1. In Salesforce.com navigate to **Setup > Create > Apps**.

**Force.com Home**

**Administer**

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Lightning for Outlook
- Lightning Sync
- Email Administration
- Google Apps
- Data.com Administration

**Build**

- Customize
- Create
- Apps
- Custom Labels
- Interaction Log Layouts
- Objects

**Apps** Quick Start New Reorder

Action	App Label	Installed Package	Console	Custom	Description
Edit	App Launcher		<input type="checkbox"/>	<input type="checkbox"/>	App Launcher tabs
Edit	Call Center		<input type="checkbox"/>	<input type="checkbox"/>	State-of-the-Art On-Demand Customer Service
Edit	Community		<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Communities
Edit	Content		<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Content
Edit   Del	Jive Salesforce Connector	Jive Salesforce Connector	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit	Marketing		<input type="checkbox"/>	<input type="checkbox"/>	Best-in-class on-demand marketing automation
Edit	Platform		<input type="checkbox"/>	<input type="checkbox"/>	The fundamental Force.com platform
Edit	Sales		<input type="checkbox"/>	<input type="checkbox"/>	The world's most popular sales force automation (SFA) solution
Edit	Salesforce Chatter		<input type="checkbox"/>	<input type="checkbox"/>	The Salesforce Chatter social network, including profiles and feeds
Edit	Sample Console		<input checked="" type="checkbox"/>	<input type="checkbox"/>	The out-of-the box console for users who work with multiple records on one screen
Edit	Site.com		<input type="checkbox"/>	<input type="checkbox"/>	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application, and manage content and published

**Subtab Apps**

Action	App Label	Description
Edit	Profile (Others)	The tabs displayed when users view someone else's profile
Edit	Profile (Self)	The tabs displayed when users view their own profile

**Connected Apps** New

Action	Connected App Name	Description	Version
Edit   Manage	MyCustomApp		1.0
Edit   Manage	SFDCPersistent	SFDC-Persistent	1.0

- Under the **Connected Apps** section, click **New**.  
The New Connected App page is displayed.

salesforce Search... Search shayt toledanot

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports Dashboards +

Quick Find / Search... Expand All | Collapse All

**New Connected App** Save Cancel

To publish an app, you need to have chosen a namespace prefix. [Click here to choose a namespace prefix.](#)

**Basic Information**

Connected App Name

API Name

Contact Email

Contact Phone

Logo Image URL  Upload logo image or Choose one of our sample logos

Icon URL  Choose one of our sample logos

Info URL

Description

**API (Enable OAuth Settings)**

Enable OAuth Settings

**Web App Settings**

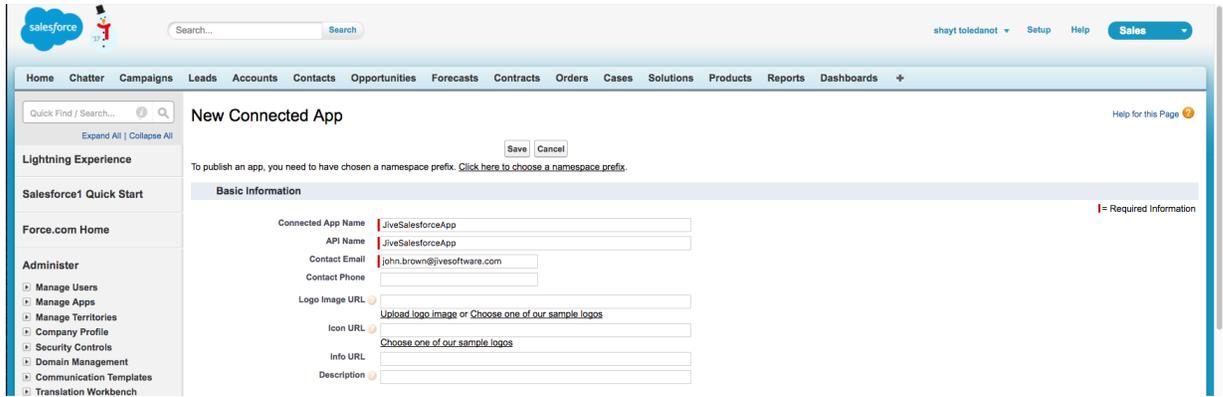
**Custom Connected App Handler**

**Mobile App Settings**

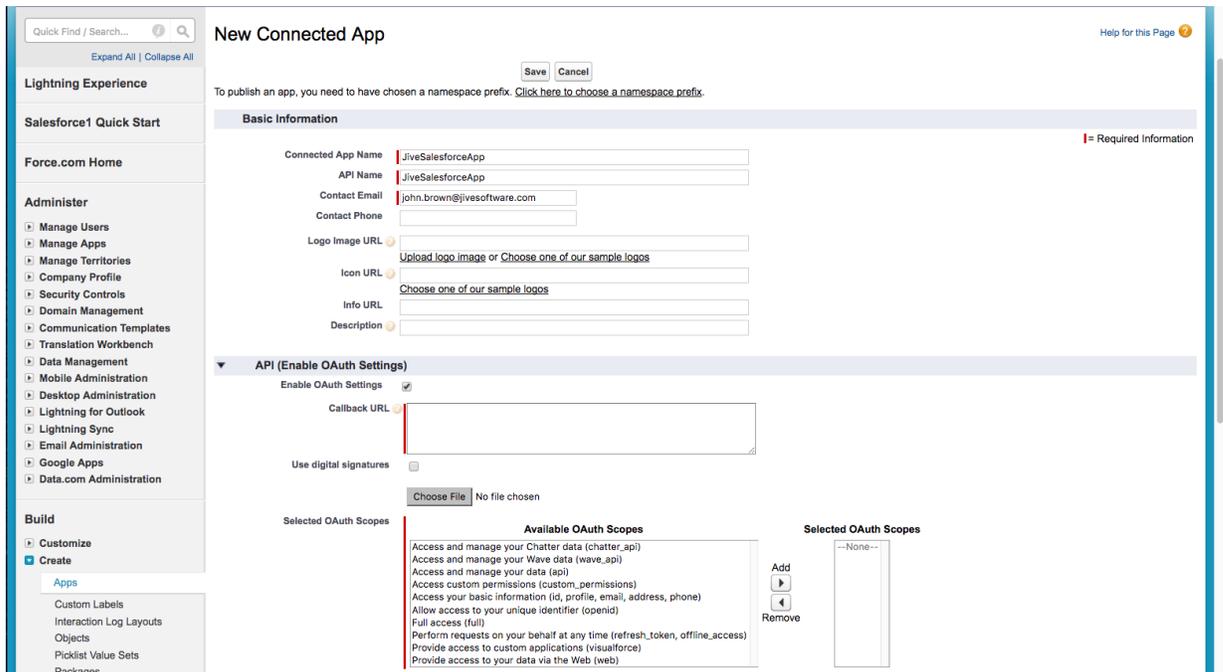
**Canvas App Settings**

Save Cancel

- Enter the required information under the **Basic Information** section.



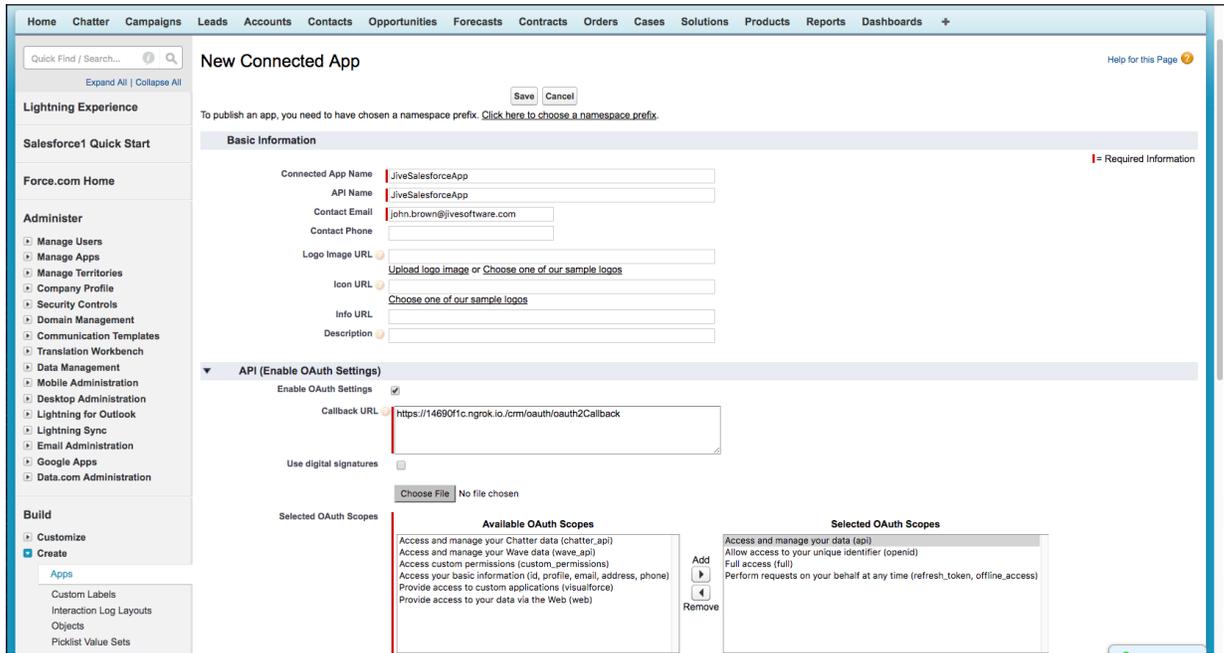
4. Under the **API (Enable OAuth Settings)** section, select the **Enable OAuth Settings** option. Additional options are displayed.



5. In **Callback URL** - type in the Jive callback URL as follows: *Service Uri + /crm/oauth/oauth2Callback*.

6. From the **Available OAuth Scopes** list, select the following scopes, then click **Add** to move them to the **Selected OAuth Scopes**.

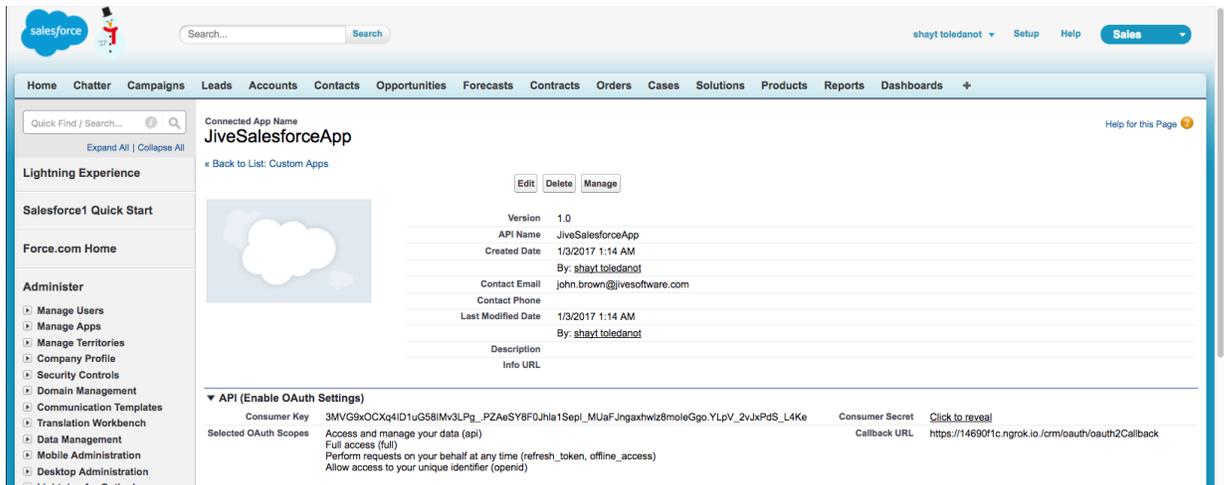
- **Access and manage your data (api)**
- **Allow access to your unique identifier (openid)**
- **Full access (full)**
- **Perform requests on your behalf at any time (refresh\_token, offline\_access)**



7. Click **Save**.

The Connected App page is displayed.

Take note of the **Consumer Key** and the **Consumer Secret**, which are both required to configure the Jive Salesforce.com add-on.



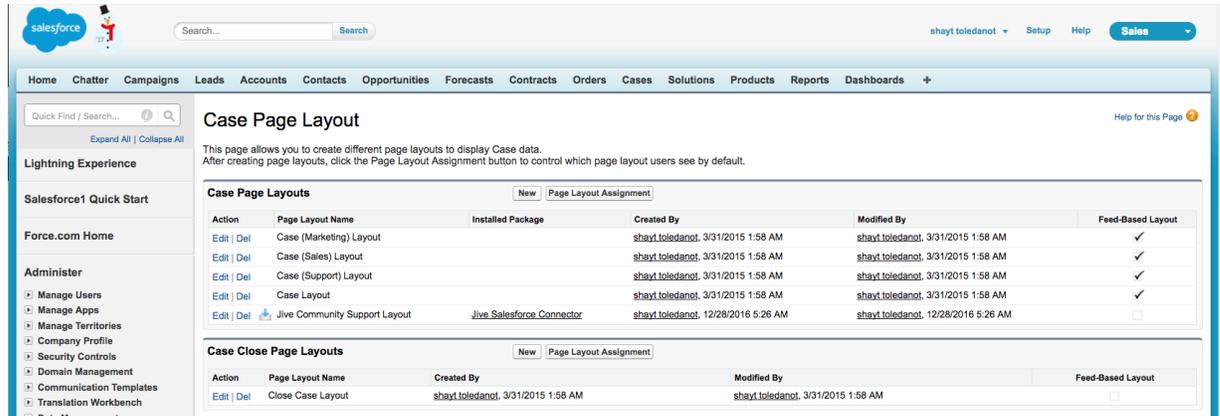
## Assigning Custom Case Page Layouts

Page layout in Salesforce controls the look and feel of Cases along with visual-force pages, related lists, buttons, fields and other components that can be displayed to the User. A customized Case page layout that includes the required components is included in the Salesforce Question-to-Case package. The page layout can be assigned to specific Profiles. Components from the page layout can be incorporated into an existing page layout.

To assign the custom Question-to-Case page layout:

1. Go to **Setup > Customize > Cases > Page Layouts**.

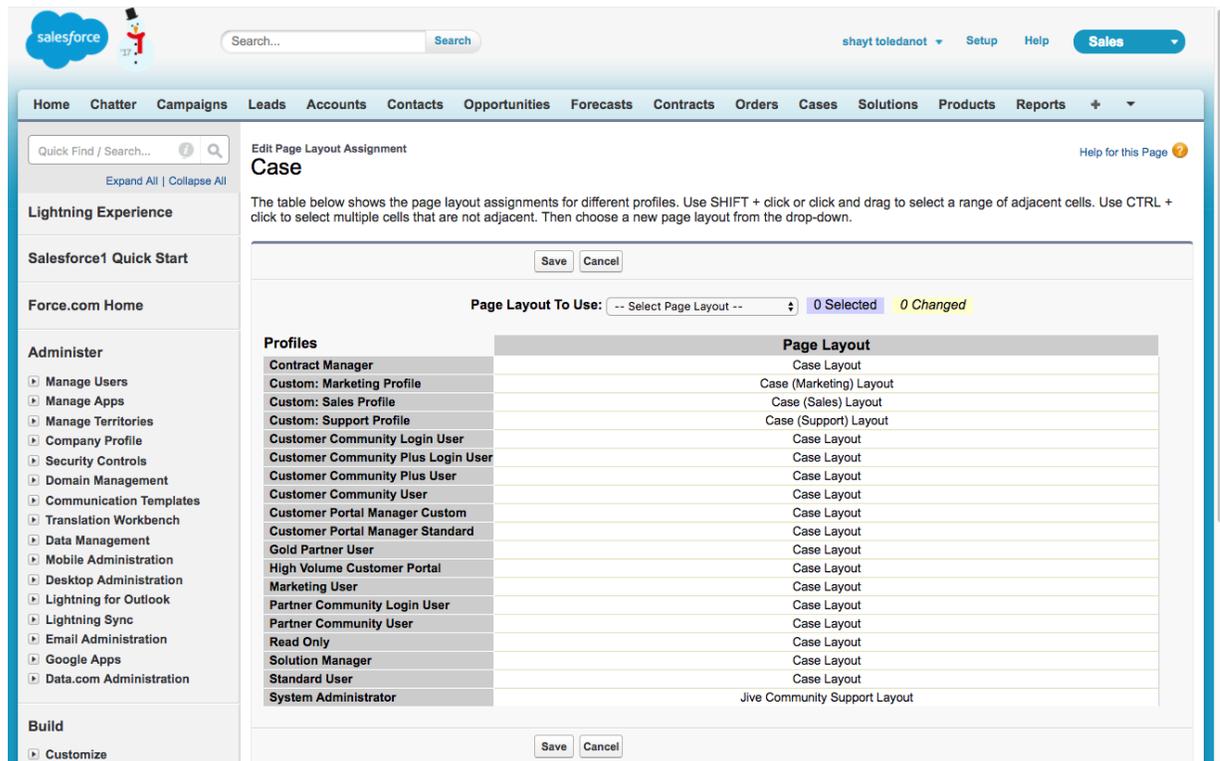
The Case Page Layout page is displayed.



2. Click **Page Layout Assignment**.

3. Click **Edit Assignment**.

The Edit Page Layout Assignment page is displayed.



4. From the **Page Layout To Use** list, select **Jive Community Support Layout** and select the profile to which you want to assign the layout.

Quick Find / Search...  Search

shayt toledanot Setup Help Sales

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Orders Cases Solutions Products Reports +

Quick Find / Search...  Search

Expand All | Collapse All

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
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- Manage Territories
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- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Lightning for Outlook
- Lightning Sync
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize

Edit Page Layout Assignment

### Case

Help for this Page

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: Jive Community Support Layout 1 Selected 1 Changed

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

Save Cancel

5. Click **Save**.

# Configuring Salesforce Question-to-Case Add-on

This section outlines how to install the Salesforce Question-to-Case connector add-on and then configure it to connect and authenticate with your Salesforce org.

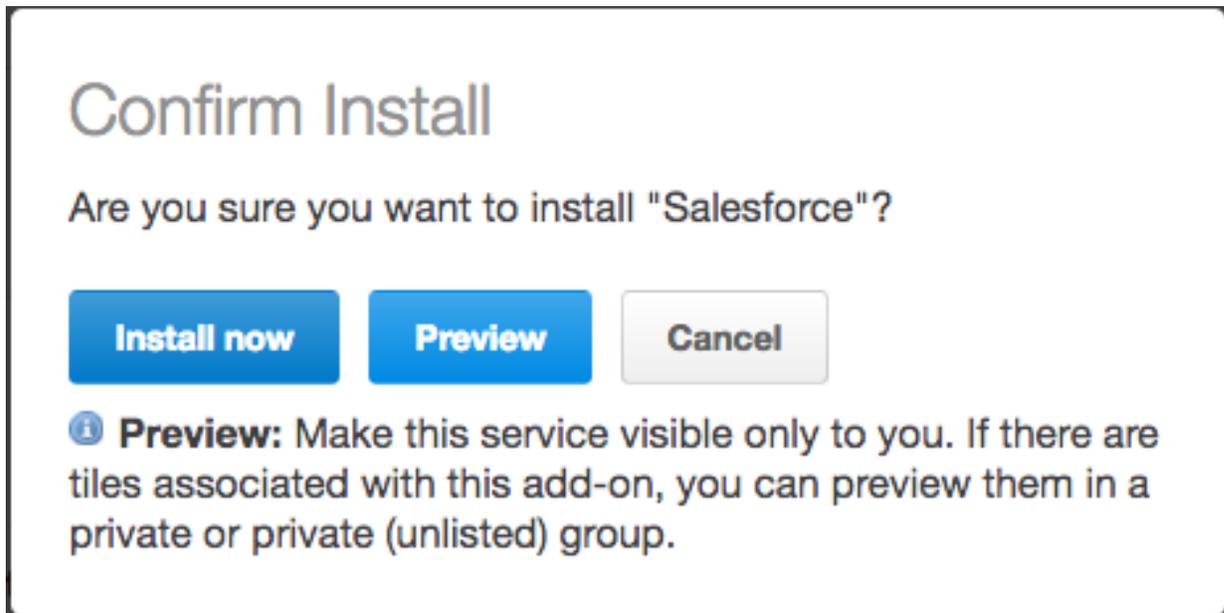
## Installing the Question-to-Case Connector Add-on

Follow this procedure to install the Question-to-Case Connector add-on.

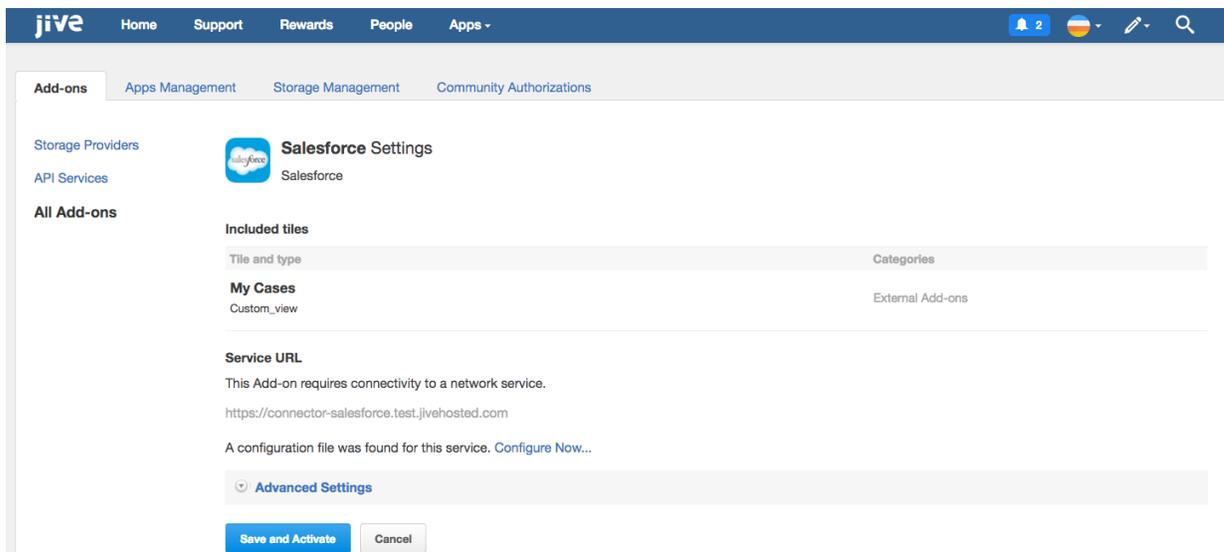
1. Log on to Jive using an administrator account.
2. From the Administrator avatar drop-down list, select **Add-Ons**.  
The All Add-ons page is displayed.
3. Click the **Available** tab and scroll down to the Salesforce add-on.

Add-on Name	Description	Read and write	Last Updated	Version	Action
<b>Jive Connector for Chime</b>	Adds actions to profiles, hover cards, places and content to Chime users. By: Jive Software	Read and write	Feb 8, 2016	Version: 1.0	Install
<b>Jive Identity Connector</b>	Enables synchronizing user profiles from this Jive instance to the Jive Identity Service. By: Jive Software	Read and write	Feb 10, 2016	Version: 20160210	Install
<b>Webhooks Test Extension</b>	This is a Webhooks test extension	Read and write	Mar 8, 2013	Version: 1.7	Install
<b>Addon with deprecated assets - V2</b>	Saves files on the node.js machine	Read and write	Mar 8, 2013		Install
<b>Syomos</b>	Pull social conversations into your stream. By: Jive Software	Read and write	Jul 13, 2016	Version: 1.0	Install
<b>Wikipedia in an Add-on</b>	Wikipedia wiki-test By: Jive Software - QA	Read and write	Mar 8, 2013	Version: 1.8	Install
<b>Custom Stream Integration</b>	Contains an activity stream that can be used to push custom content into a group activity stream with an HTTP POST request to a unique URL.	Read and write	Nov 13, 2016		Install
<b>Jive for iOS</b>	Official Jive Mobile Client for iOS	Read and write	Dec 2, 2016		Install
<b>Salesforce</b>	Salesforce By: Jive Software	Read and write	Dec 25, 2016	Version: 1.0	Install

4. Click **Install** next to the **Salesforce** add-on.
5. Confirm the message that appears by clicking **Install now**.



The Salesforce Settings page is displayed.



6. Continue to [Configuring the Question-to-Case Add-on](#) on page 13.

## Configuring the Question-to-Case Add-on

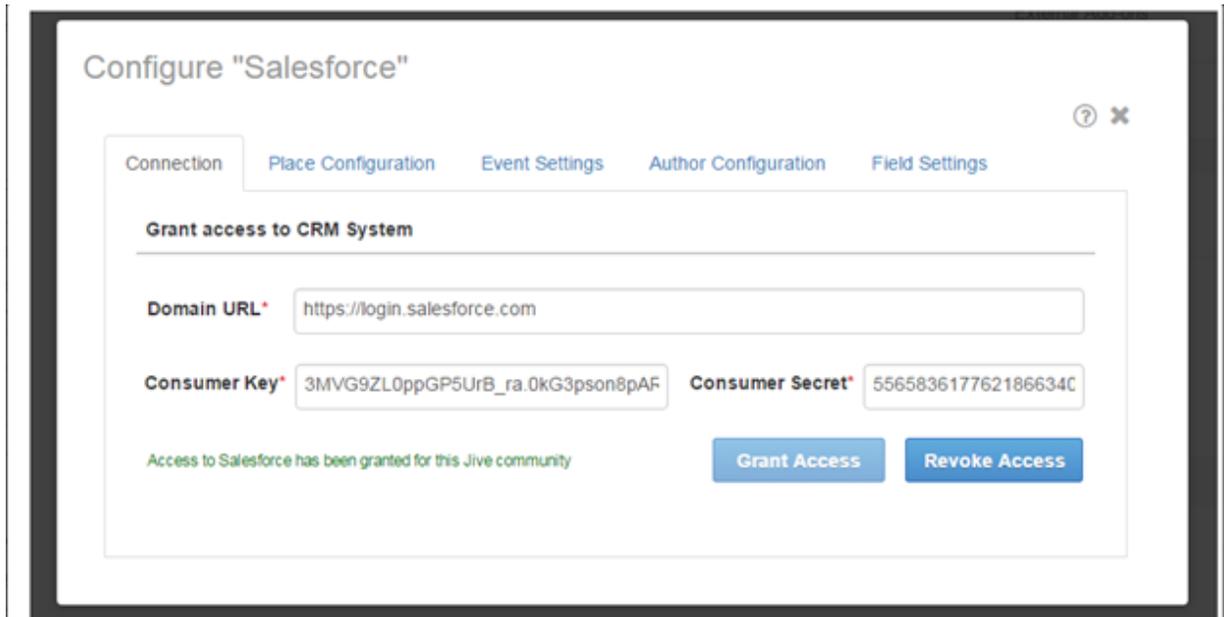
Before completing this task, you need to:

- Obtain Salesforce app **Consumer Key** and **Consumer Secret** by creating a Connected App in your Salesforce org (see, [Creating Connected App](#) on page 6)
- Install the Salesforce Question-to-Case add-on (see, [Installing the Question-to-Case Connector Add-on](#) on page 12)

To configure the Question-to-Case add-on:

1. In the Salesforce Settings page (**Add-ons** > **Installed** > **Salesforce** > **Settings**), click **Configure Now**.

The Configure Salesforce window is displayed.



2. In the **Connection** tab:

a) Enter the following information:

- **Domain URL** - add domain URL as <https://login.salesforce.com>. If you want to connect to Salesforce sandbox add <https://test.salesforce.com>.
- **Consumer Key** and **Consumer Secret** - type in your Salesforce app Consumer Key and Secret. The key and secret along with user credentials are used to grant authorization to Salesforce org.

b) Click **Grant Access**.

The authorization message: "Access to Salesforce has been granted for this Jive community" is displayed.



**Note:** if the authorization fails, verify Consumer Key and Secret and the domain URL.

Continue to the next step only if the authorization is successful and the authorization message is displayed.

3. In the **Place Configuration** tab:

Unanswered questions created in the added place are monitored by the Salesforce Question-to-Case Connector and assigned as cases to the selected Salesforce queue after the specified **Hours for escalation**.

- a) Click **Add Place** and type in the Group or Space name you want to connect with Salesforce.
- b) In **Queue** - select the corresponding Salesforce queue.
- c) In **Hours after escalation** - specify the time after which cases are created in the Salesforce queue.

**Configure "Salesforce"**

Connection | **Place Configuration** | Event Settings | Author Configuration | Field Settings

**Configure SLA**  
 Unanswered questions will automatically generate cases when the escalation time has been reached.  
 Escalation time(SLA) for the unanswered questions will be applicable from the time of the place configuration.

[Add a Place](#)

Place	Queue	Hours after escalation ( Bulk Edit )
iPhone Support	iPhone Support	0

[Save](#)

4. In the **Event Settings** tab:

Specify Jive events and configure the their corresponding Salesforce fields and their values. The values of the fields you configure update when the Jive events occur.

For example, under **Enable Mark Correct Answer** event, you configure the Salesforce **Status** field with the value **Escalated**. When a question in Jive gets a correct answer, the **Status** field of the corresponding Salesforce case is modified to **Escalated**.

5. In the **Author Settings** tab:

- **Enable contact Sync-up** - a salesforce contact is created for each unique question author at the time the Salesforce case is created.
- **Configure Reply-By** - Salesforce agent name along with the text specified in **Append the following text after the agent's name** is displayed with replies from Salesforce that are posted to Jive questions.

6. In the **Field Settings** tab:

a) In the **Mapping** tab, map Jive question's Subject and Body fields to Salesforce fields.

Map these fields only if you want to copy the Jive question's Subject and Body fields to fields **other** than Case Subject and Case Description.

b) In the **Values** tab, add Salesforce fields and configure their corresponding values.

7. Click **Save**.