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for Salesforce Question-to-Case Connector

Contents

Cloud Help for Community Managers

What is the Salesforce Question-to-Case Connector

The Salesforce Question-to-Case Connector syncs questions created in Jive to Salesforce org cases. This allows Salesforce agents to comment directly in the Salesofrce 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, Saleforce 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

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

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)

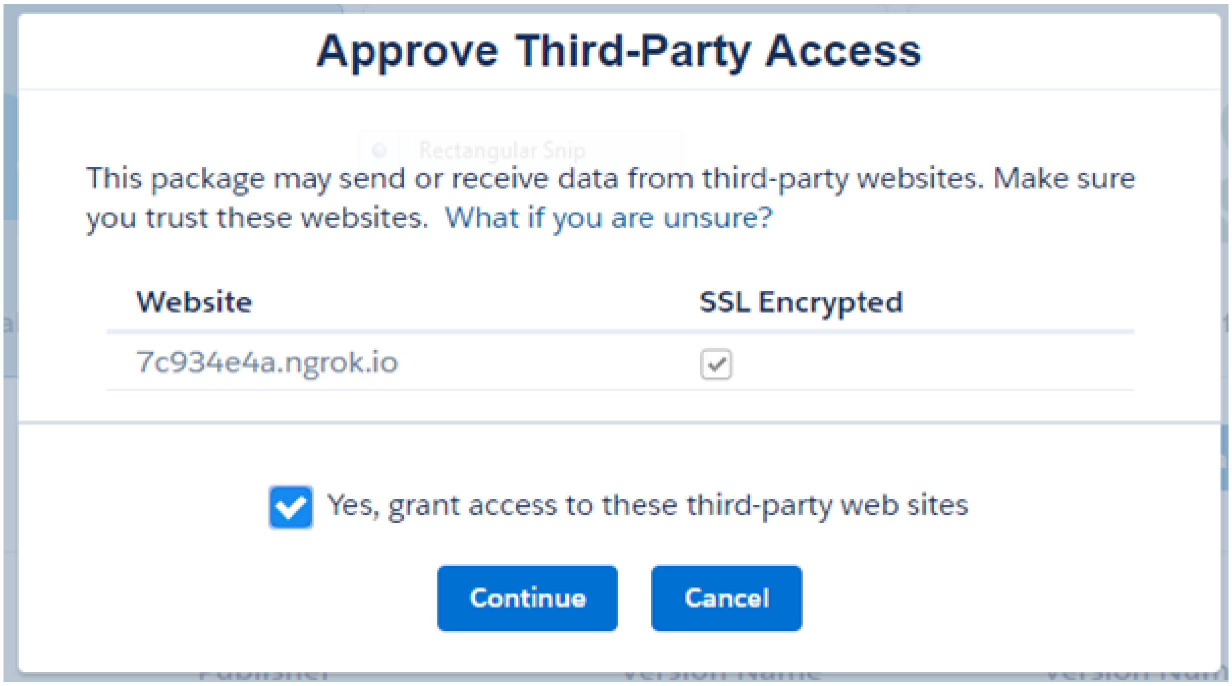
Installing the Salesforce Question-to-Case Package

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.

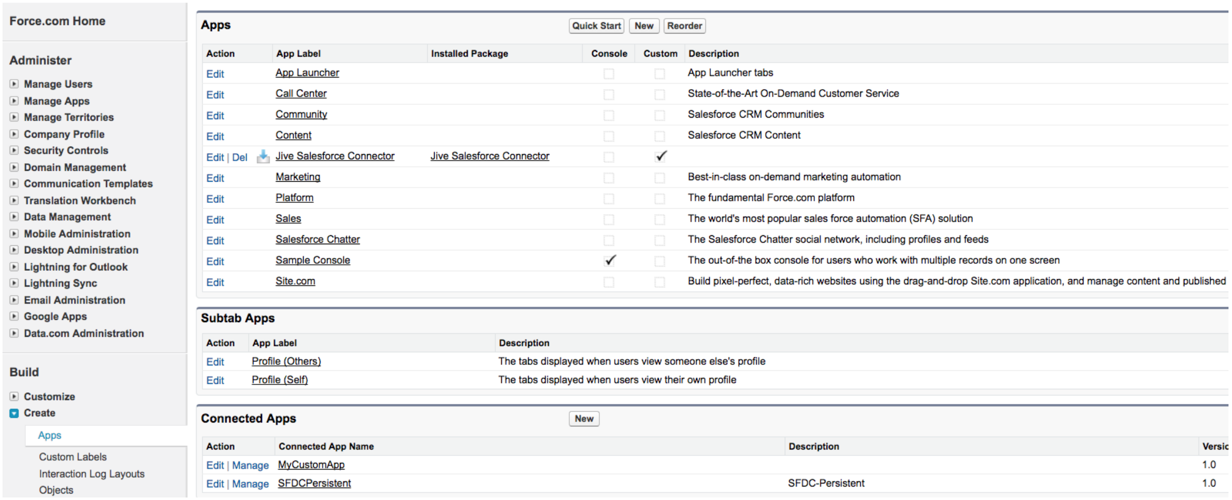


3. Select the option **Yes, grant access to these third-party web sites** and click **Continue**.

Creating Connected App

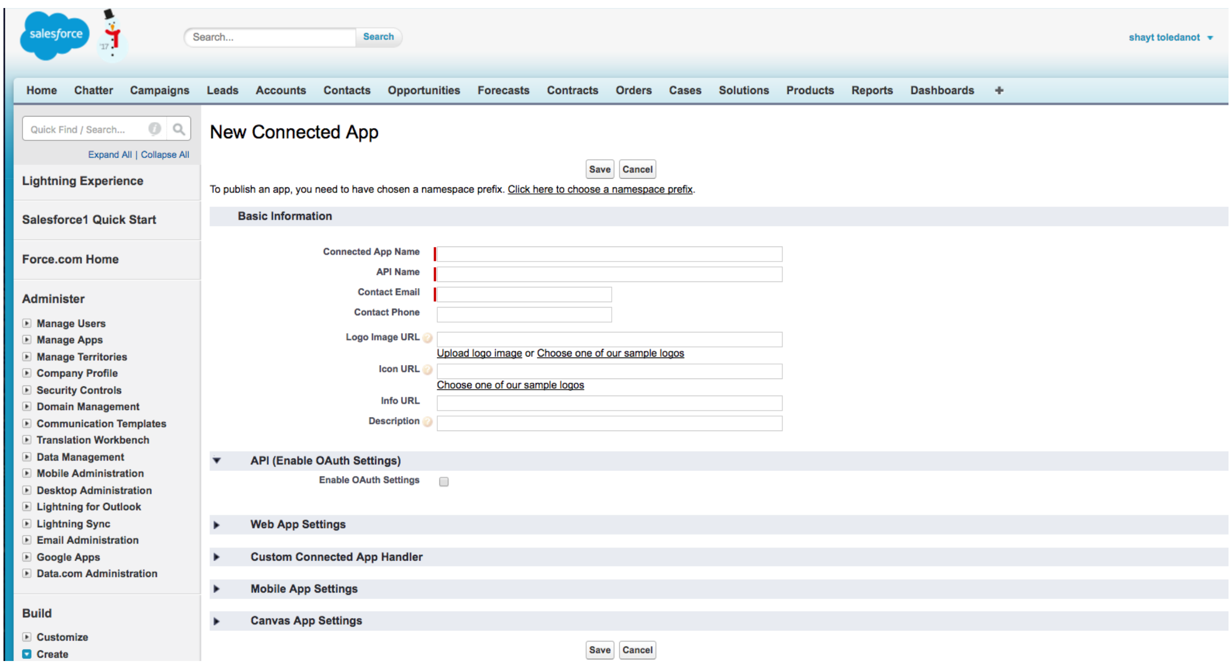
After creating the app, Consumer Key and Consumer Secret are generated. You use these keys to connect the Question-to-Case Connector add-on to your Salesforce org.

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

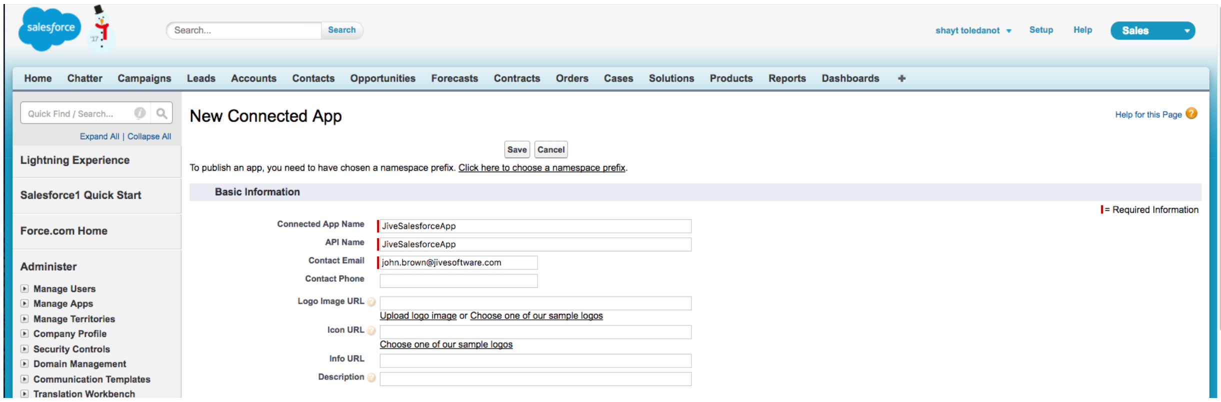


2. Under the **Connected Apps** section, click **New**.

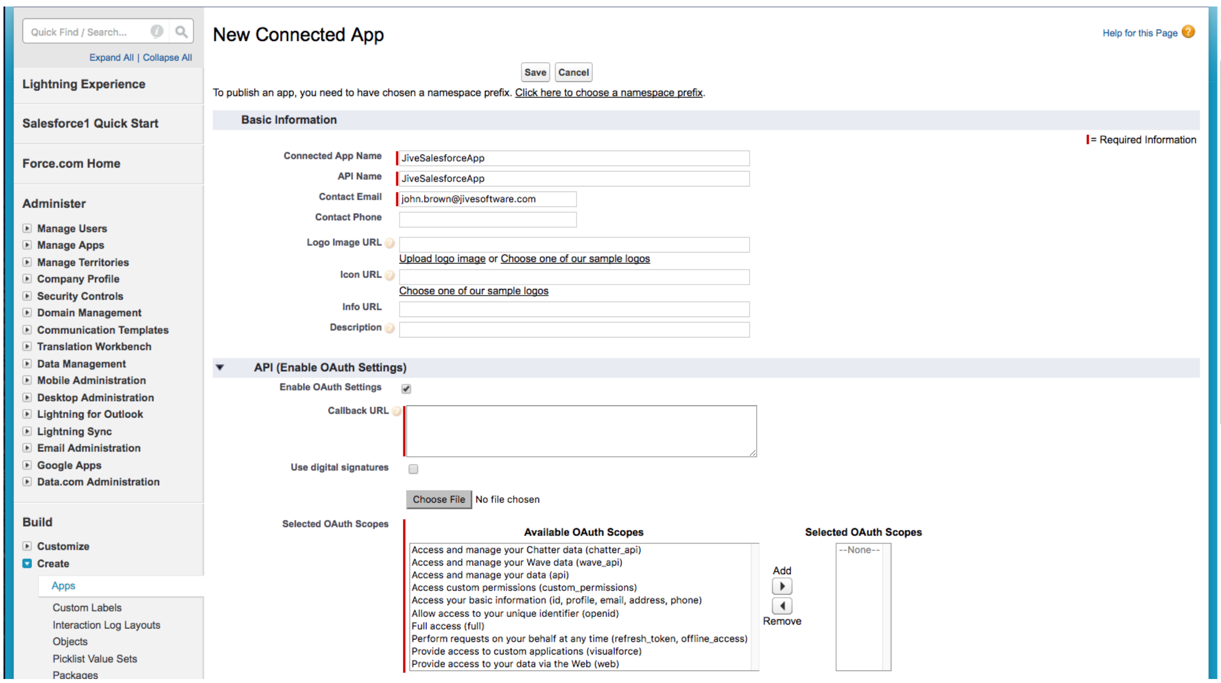
   The New Connected App page is displayed.



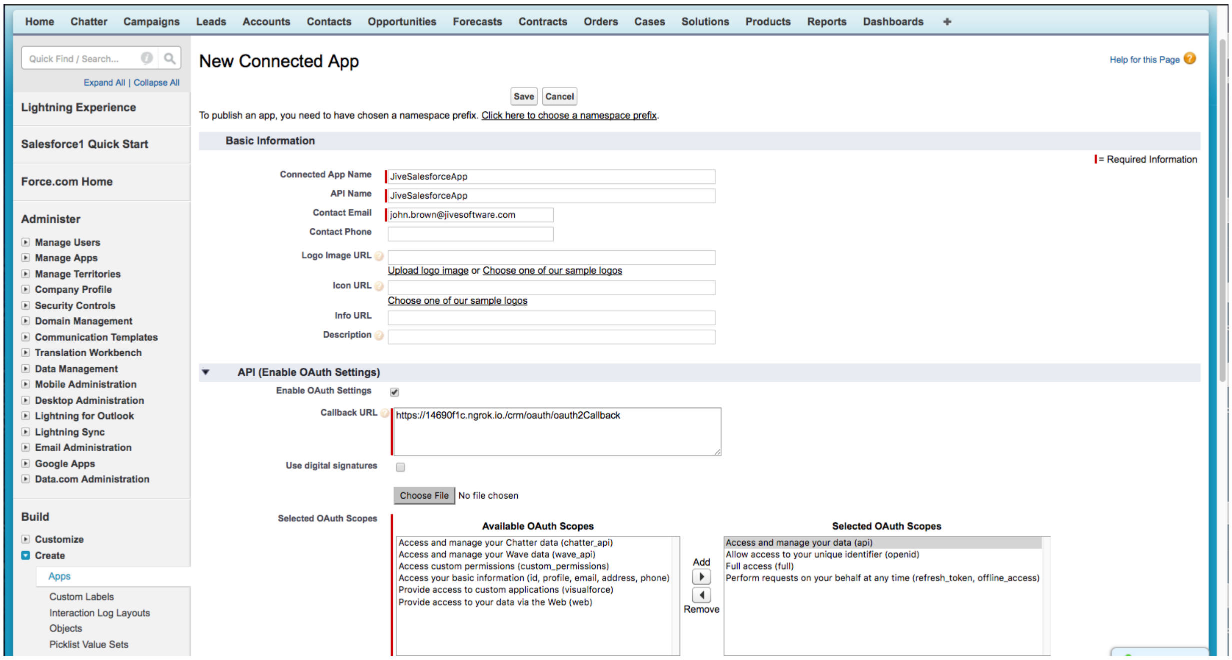
3. Enter the required information under the **Basic Information** section.



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



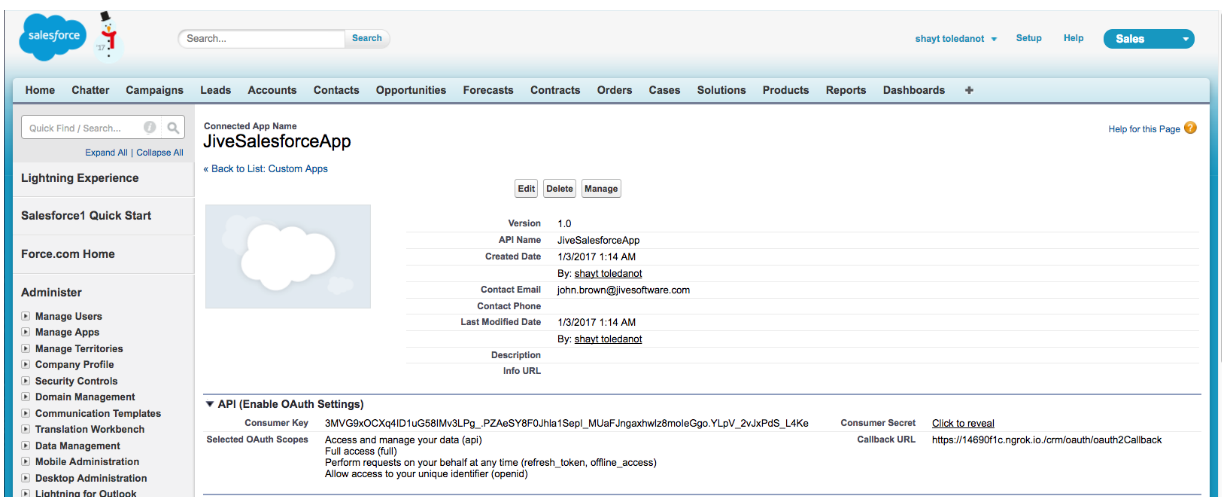
5. In **Callback URL** - type in the Jive callback URL as follows: *Service Uri* + /crm/oauth/oauth2Callback.
6. From the **Available OAuth Scopes** list, select the following scopes, then click **Add** to move them to the **Selected OAuth Scopes**.
   - **Access and manage your data (api)**
   - **Allow 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.

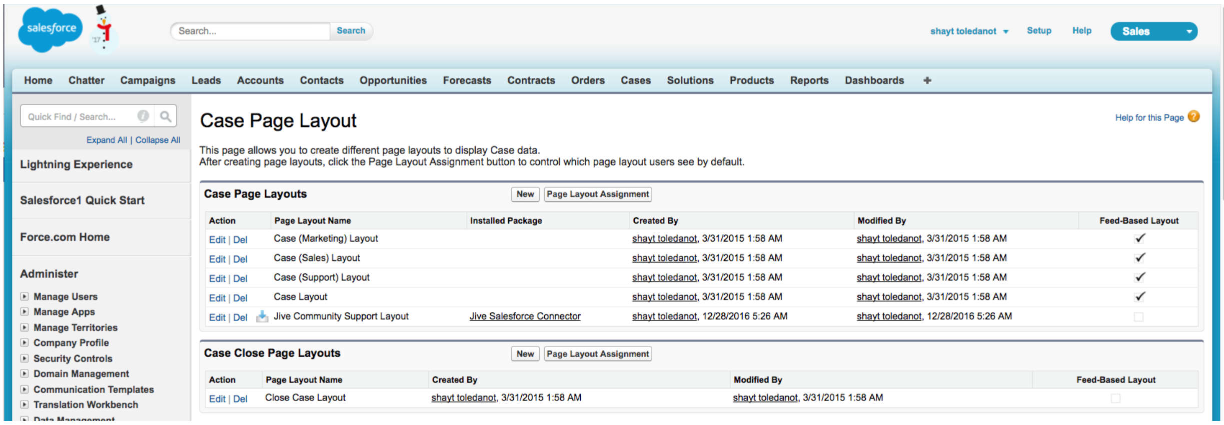


Assigning Custom Case Page Layouts

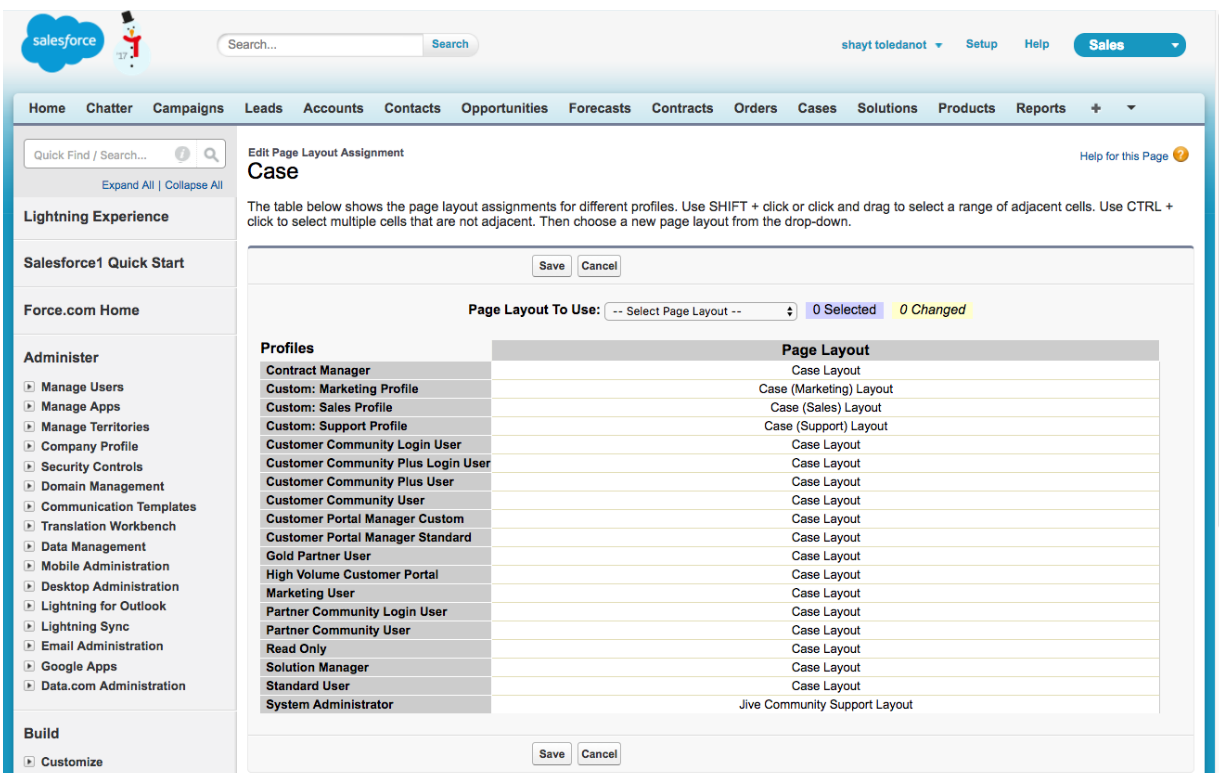
Page layout in Salesforce controls the look and feel of Cases along with visual-force pages, related lists, buttons, fields and other components that can be displayed to the User. A customized Case page layout that includes the required components is included in the Salesforce Question-to-Case package. 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:

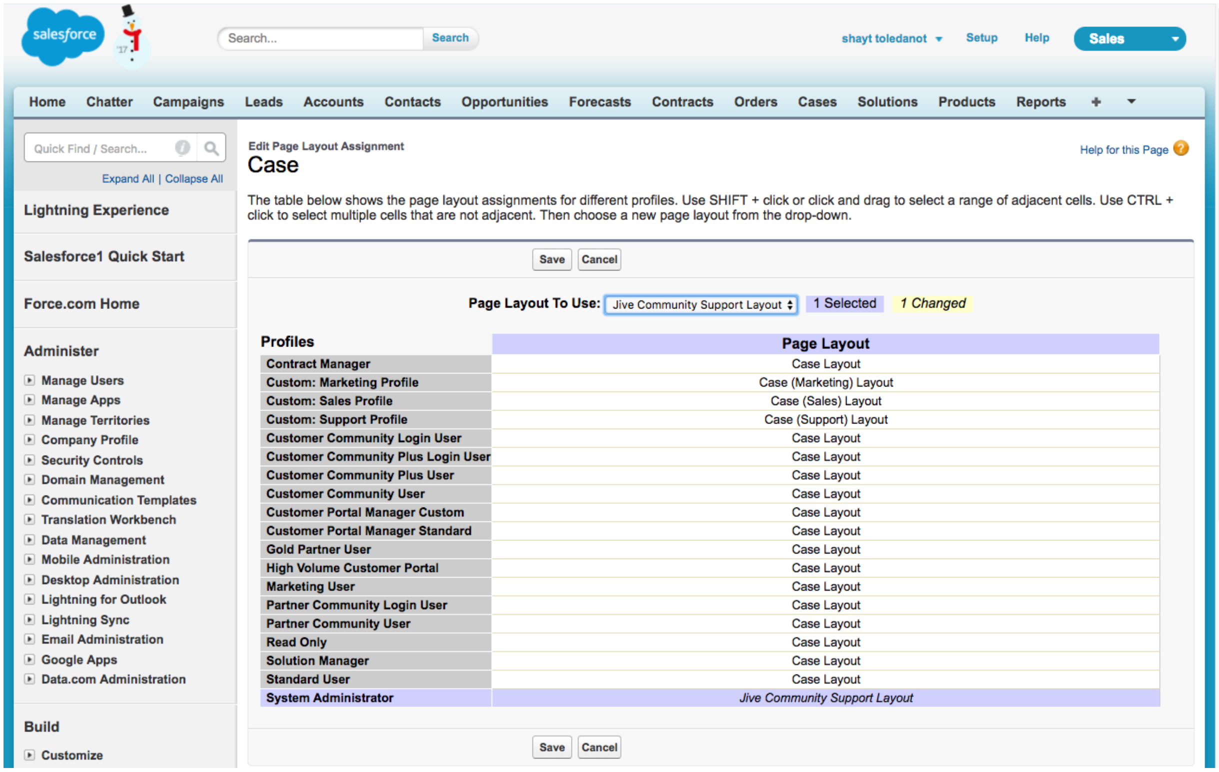
1. Go to **Setup** > **Customize** > **Cases** > **Page Layouts**.
   The Case Page Layout page is displayed.



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.


salesforce
Search...
Search
shayt toledanot
Setup
Help
Sales
Home
Chatter
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Orders
Cases
Solutions
Products
Reports
Quick Find / Search...
Expand All | Collapse All
Lightning Experience
Salesforce1 Quick Start
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
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**.

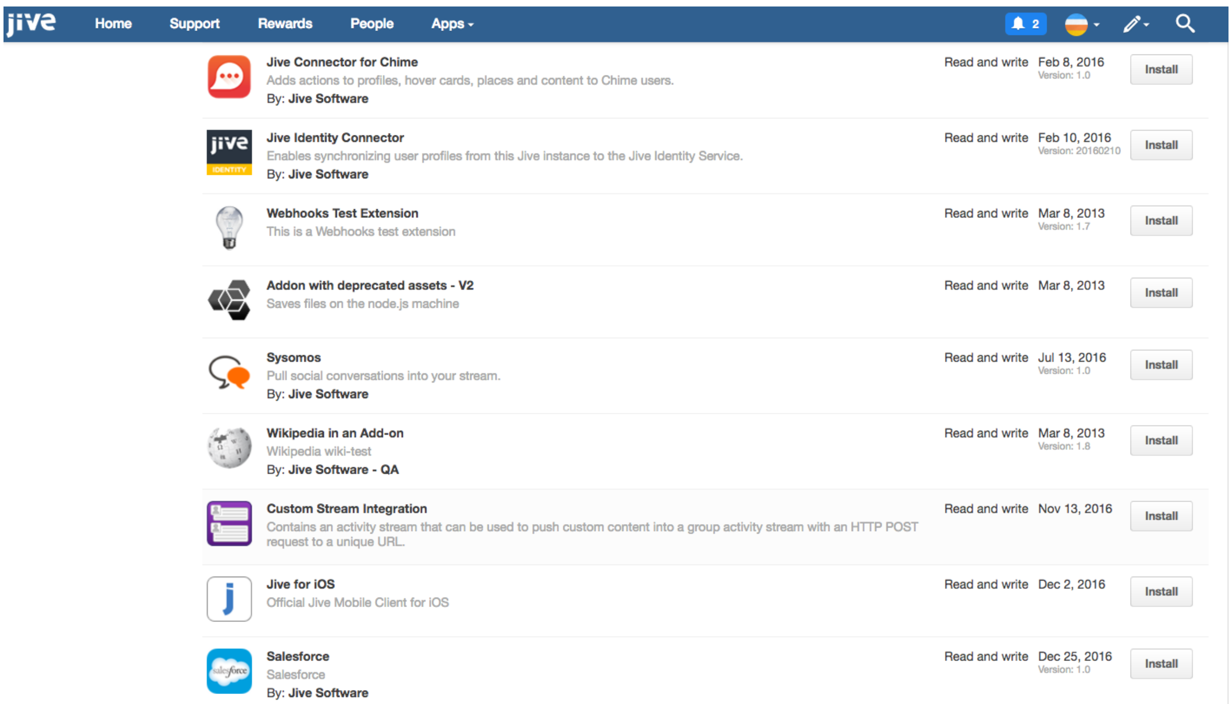
Configuring Salesforce Question-to-Case Add-on

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.

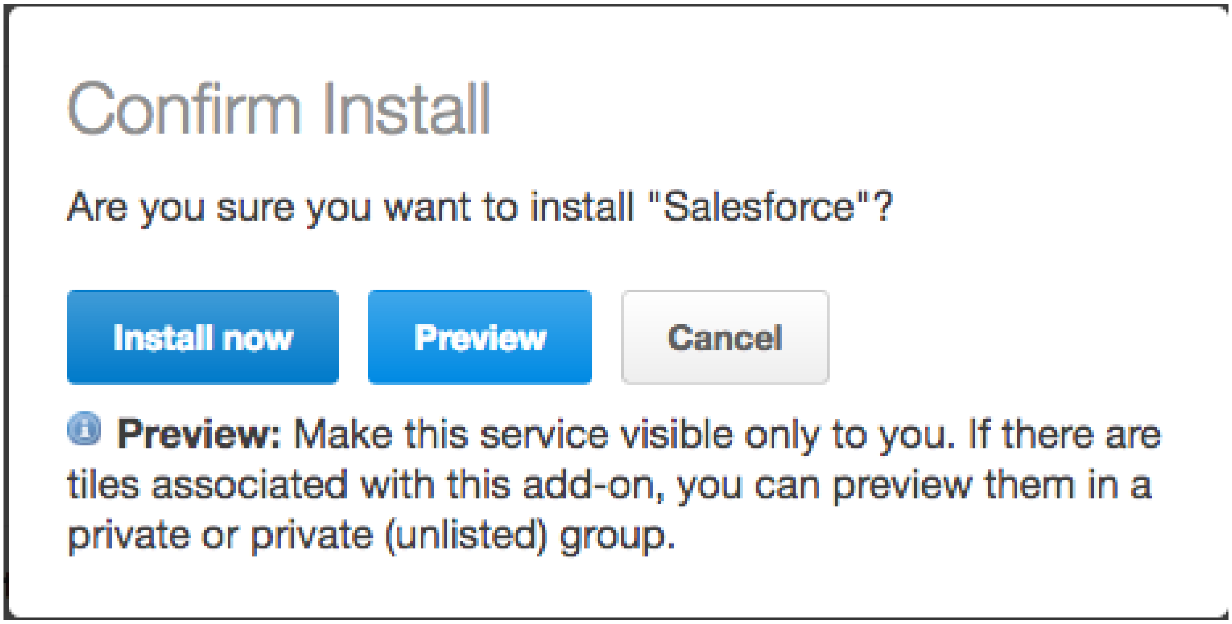
Installing the Question-to-Case Connector Add-on

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

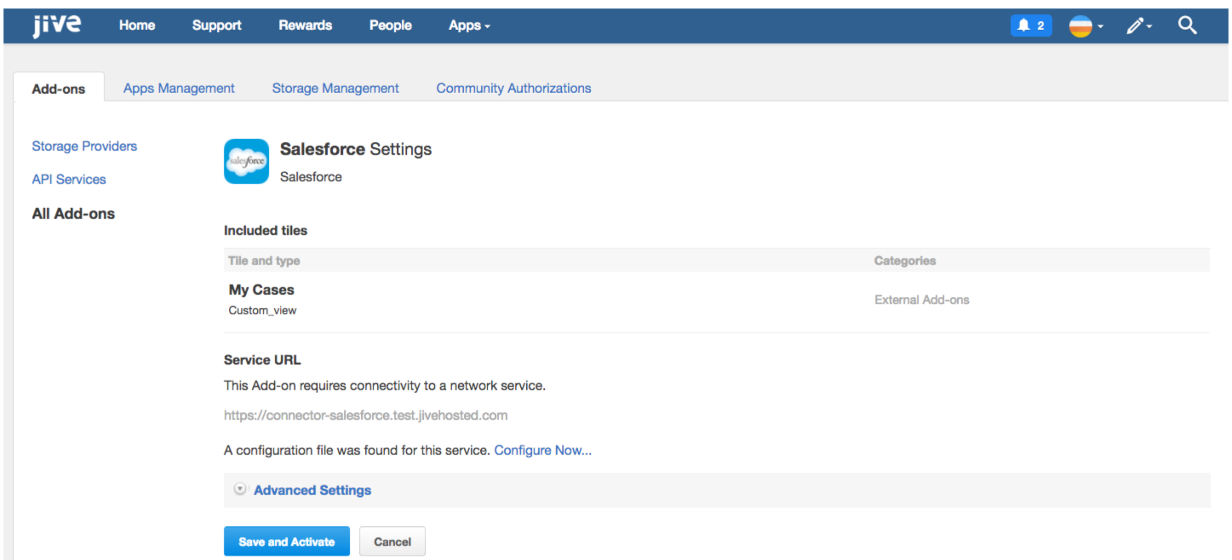
1. Log on to Jive using an administrator account.
2. From the Administrator avatar drop-down list, select **Add-Ons**.
   The All Add-ons page is displayed.
3. Click the **Available** tab and scroll down to the Salesforce add-on.



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.

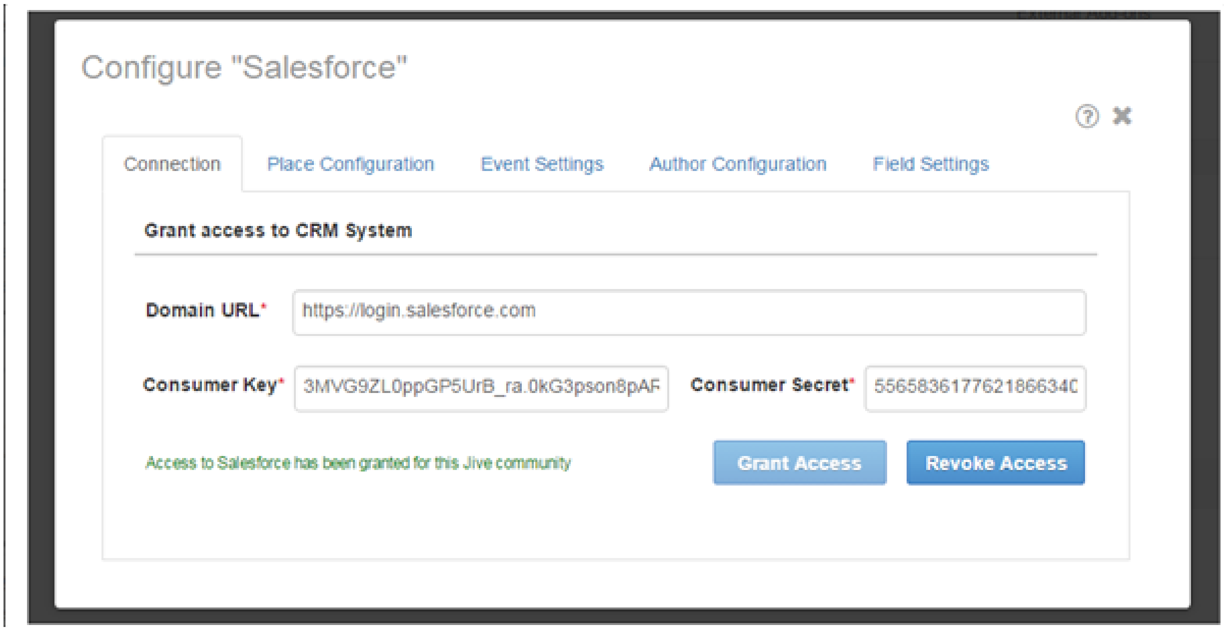
Configuring the Question-to-Case Add-on

Before completing this taks, 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-Cass 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.



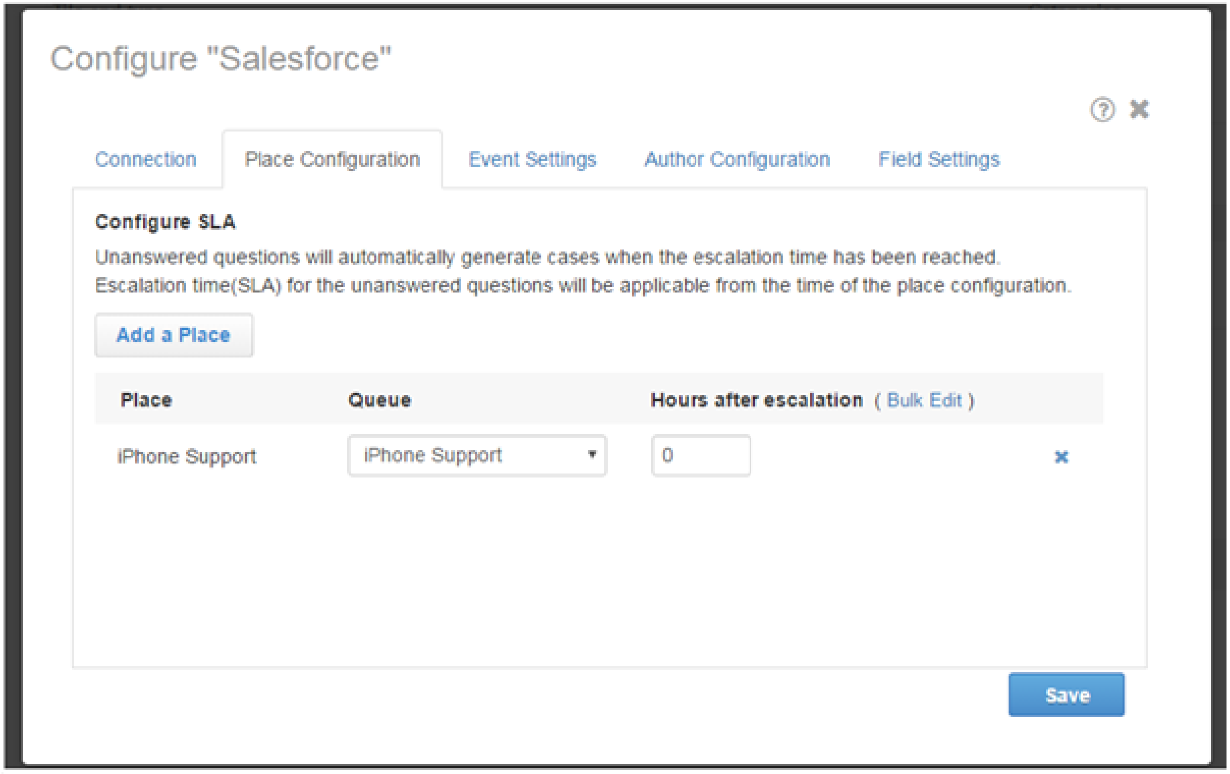
2. In the **Connection** tab:
   a) Enter the following information:
      - **Domain URL** - add domain URL as https://login.salesforce.com. If you want to connect to Salesforce sandbox add https://test.salesforce.com.
      - **Consumer Key** and **Consumer Secret** - type in your Salesforce app Consumer Key and Secret. The key and secret along with user credentials are used to grant authorization to Saleforece 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.



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**.