

VersionOne Salesforce.com Case Connect

Post Install Instructions

Overview

Case Connect is VersionOne's integration with Salesforce Cases. This integration creates Defects in VersionOne based on Cases in Salesforce.com. Using this integration your organization can leverage its investment in Salesforce Cases Management as part of an integrated platform for Agile development.

Once the integration is installed and configured, Salesforce users can specify which Cases require engineering attention and associate them with VersionOne Defects. Salesforce users can choose to create a new VersionOne Defect or assign the Case to an existing VersionOne Defect.

After the association is made, the Salesforce user can view the VersionOne Defect from Salesforce and can publish the VersionOne Defect Status to the Salesforce Case.

System Requirements

VersionOne

The integration is supported with the following VersionOne editions

- Team
- Enterprise
- Ultimate

Your VersionOne instance must be accessible from the internet in order to use Case Connect.

Salesforce.com

The integration was been tested with the Summer 2010 release of Salesforce.com in the following editions

- Enterprise
- Developer

Download and Installation

Case Connect is available on the [Salesforce.com AppExchange site](#) and is installed into your Salesforce.com instance from that location. The integration is provided without any additional license fees.

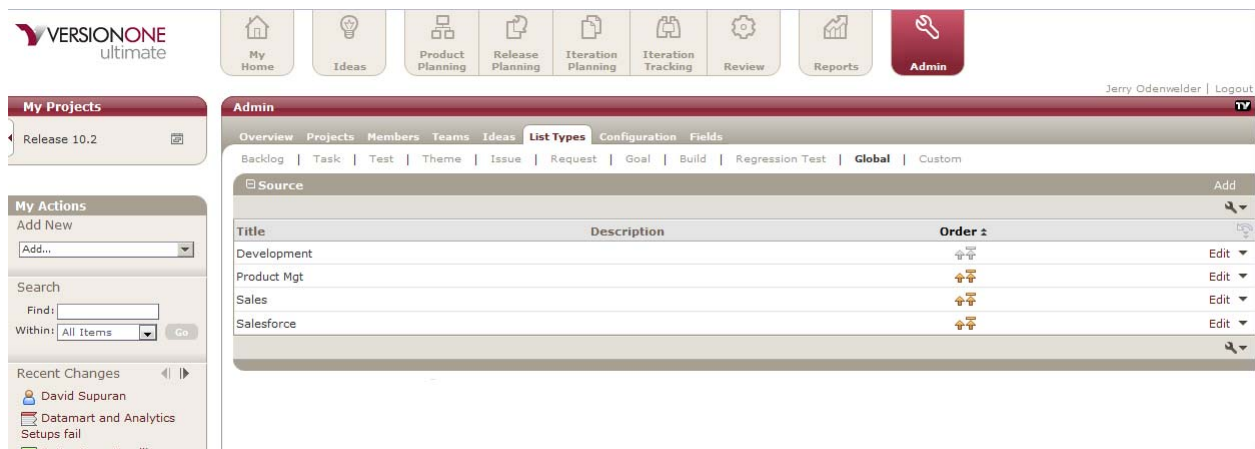
Configure VersionOne

To configure VersionOne, you need to add "Salesforce" as a valid Source in VersionOne. To accomplish this

1. Log into VersionOne as a member with Administrator privileges.

2. Click on **Admin**
3. Click on **List Types**
4. Click on **Global**
5. The top grid contains a list of valid Source values.
6. If Salesforce is not already in this list
 - a. Click **Add**
 - b. Put 'Salesforce' (no quotes) in the *Title* field
 - c. Click **Ok**

The following image is an example of the VersionOne Source list with an entry for Salesforce.



Configure Salesforce.com

After installing CaseConnect you need to configure your Salesforce.com instance. To configure your Salesforce.com instance you need to:

1. Add your VersionOne instance as a valid Remote Site in Salesforce.com.
2. Configure the VersionOne connection parameters
3. Configure your Salesforce.com PageLayout for Cases to include the necessary VersionOne fields.

The following sections describe how to perform each of these steps.

Add a Remote Site

To access VersionOne from your Salesforce.com instance you need to add your VersionOne instance as a Remote Site. To access the Remote Sites page:

1. Click **Setup** to access the Personal Setup page
2. Expand **Security Controls**, which is located under Administration Setup
3. Click **Remote Site Settings**

The screenshot shows the Salesforce Setup interface. At the top, the 'Setup' link is circled in red with a red '1' below it. In the left sidebar, under 'Administration Setup', 'Security Controls' is circled in red with a red '2' next to it, and 'Remote Site Settings' is circled in red with a red '3' next to it. The main content area displays the 'Personal Setup' section, which includes sub-sections like 'My Personal Information', 'Email', 'Import', 'Desktop Integration', and 'Getting Started'.

From this page, you need to click the **New Remote Site** button. To add a Remote Site you need to provide the following information

Field Name	Description
Remote Site Name	A descriptive name for the remote site.
Remote Site URL	The URL for your VersionOne instance, without any page reference.
Disable Protocol Security	Do not select this checkbox
Description	Optionally provide some descriptive text.
Active	Check this box

Once you've entered this information, click **Save** to commit the changes. The following image contains an example of a VersionOne Remote Site.

salesforce.com

Setup · System Log · Help & Training · Logout

force.com appsSales

HomeCasesAccountsContactsReportsDashboardsDocumentsProductsVersionOne Defect Report

Personal Setup

My Personal Information

Email

Import

Desktop Integration

App Setup

Customize

Create

Develop

Deploy

View Installed Packages

Critical Updates

Administration Setup

Manage Users

Company Profile

Security Controls

Sharing Settings

Field Accessibility

Password Policies

Session Settings

Network Access

Certificate and Key Management

Single Sign-On Settings

View Setup Audit Trail

Expire All Passwords

Delegated Administration

Remote Site Settings

HTML Documents and Attachments Settings

Communication Templates

Translation Workbench

Data Management

Monitoring

Mobile Administration

Desktop Administration

Email Administration

Google Apps

All Remote Sites

Help for this Page

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites

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

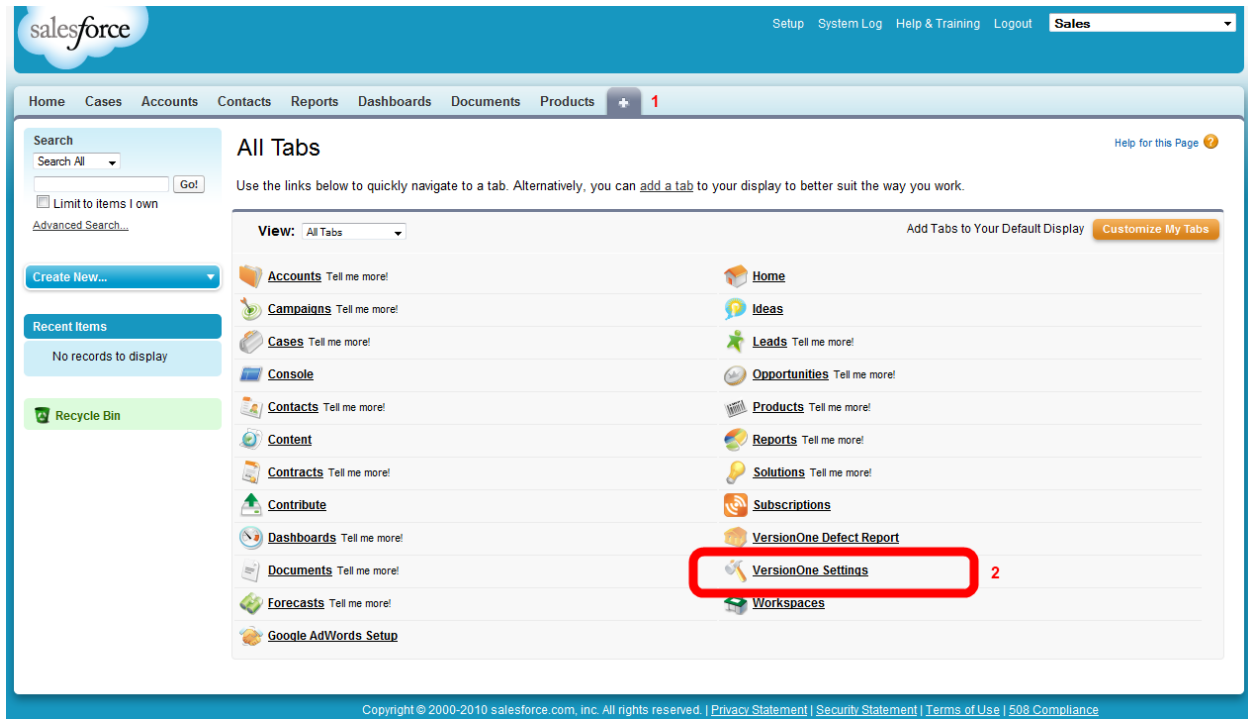
New Remote Site

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
Edit Del	VersionOne	-	https://www7.v1host.com	✓	Odenwelder, Jerry	8/2/2010 2:39 AM	Odenwelder, Jerry	8/4/2010 9:25 AM

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

VersionOne Configuration

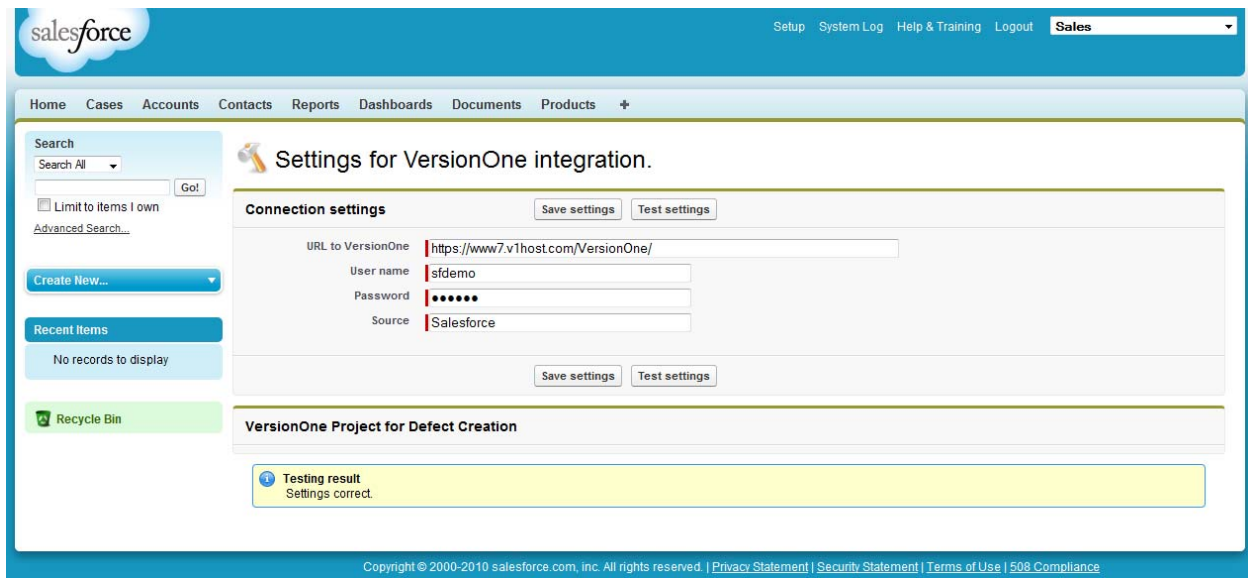
The VersionOne configuration parameters are located in the VersionOne Settings tab. This tab is accessible from the All Tabs button.



On the VersionOne Settings tab you must first provide the following information

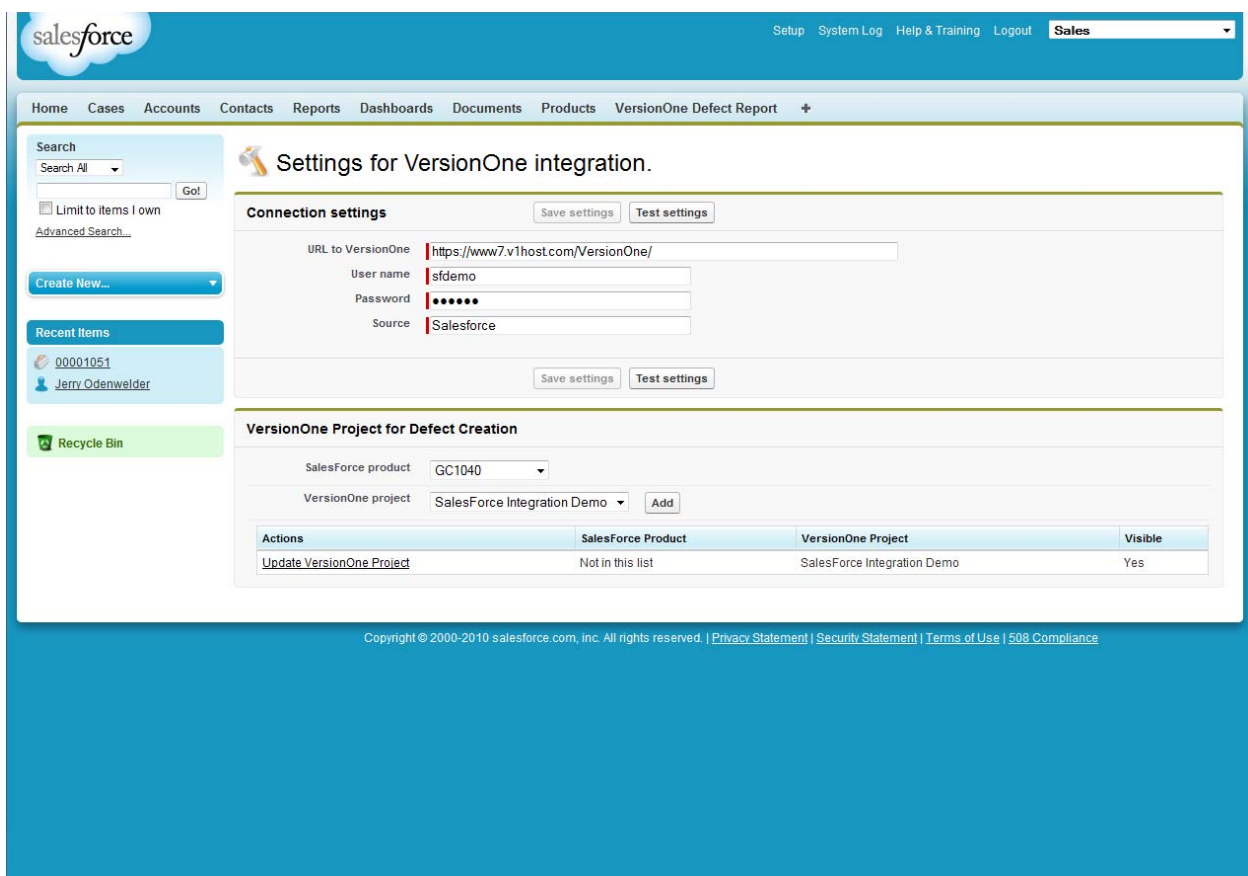
Field Name	Description
URL to VersionOne	The URL for your VersionOne instance, without any page reference.
Username	Username for a valid VersionOne member with access to the VersionOne projects where you want to create Defects.
Password	Password for specified user
Source	The Source list value you entered in VersionOne. By default this should be Salesforce

After you enter this information, click **Test Settings** to verify that the parameters entered are valid. The following image illustrates a Salesforce.com instance with valid VersionOne parameters.



Once Salesforce.com indicates that the settings are valid (above image), click **Save Settings**.

After saving, you are allowed to specify where Defects are created in VersionOne.



VersionOne Defects are created in VersionOne Projects based on Salesforce product codes. The first entry in the list is the Default Mapping, which is used when a Salesforce Product Code cannot be found

in the list, or if the Product Code field is left blank. You cannot remove this entry, but you can choose which VersionOne Project is used. If you want to have all defects from Salesforce go into a single project in VersionOne, you would not need to create any additional mappings. *Note: Using a single mapping is beneficial for initial testing because it limits where you need to look when creating defects.*

To add a new mapping



1. Select a Salesforce Product Code
2. Select the desired VersionOne Project
3. Click **Add**

Once an entry has been added you can update the entry by making the desired change and clicking **Update** on the desired row. You may also remove an entry by clicking **Remove** on the desired row.

Case Layout

The final step in configuring your Salesforce.com instance is to make the Case Connect fields available to your Salesforce users. To modify the Case Layout

1. Click **Setup**
2. Expand Customize, located under App Setup
3. Expand Cases
4. Click on **Page Layouts**

salesforce.com  [Setup](#) [System Log](#) [Help & Training](#) [Logout](#)  **Sales**

Home Cases Accounts Contacts Reports Dashboards Documents Products

Personal Setup [Help for this Page](#)

My Personal Information

- Edit your information, language, time zone, quota, or sales team
- Change your password
- Reset your security token
- Create or edit a personal group
- Customize your tabs and related lists
- Grant login access to your administrator or salesforce.com Customer Support
- Manage the visibility of your calendar to other users
- Edit your reminder settings

Email

- Change your outgoing email settings
- Create or edit an email template
- Change your outgoing Stay-in-Touch email settings

Import

- Import your data from Outlook, ACT!, etc.

Desktop Integration

- Connect for Microsoft Outlook
- Connect for Lotus Notes
- Connect for Office
- Download Force.com Connect Offline
- Remove records from your Force.com Connect Offline Briefcase
- Define your Force.com Connect Offline Briefcase settings





Getting Started

- Take Sales Representative Fundamentals Online Training
- Take Customer Support Fundamentals Online Training
- Take Campaign Management Online Training
- Tips & Hints for Sales Reps
- Tips & Hints for Support Reps
- Tips & Hints for Activities
- CRM Rollout Guide

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- Getting Started

App Setup

- Customize** 
 - Tab Names and Labels
 - Home
 - Activities
 - Campaigns
 - Leads
 - Accounts
 - Contacts
 - Opportunities
 - Quotes 
 - Forecasts
 - Cases** 
 - Fields
 - Validation Rules
 - Triggers
 - Contact Roles
 - Page Layouts** 
 - Search Layouts
 - Assignment Rules
 - Escalation Rules
 - Buttons and Links
 - Support Processes
 - Record Types
 - Support Settings
 - Auto-Response Rules
 - Email-to-Case
 - Case Teams
 - Case Comments
 - Self-Service
 - Call Center
 - Contracts
 - Solutions

On the Case Page Layout page you will find a layout with the name “Case (VersionOne) Layout”.

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 users see by default.

Case Page Layouts			
		New	Page Layout Assignment
Action	Page Layout Name	Created By	Modified By
Edit Del	Case (VersionOne) Layout	Jerry Odenwelder, 8/3/2010 8:04 AM	Jerry Odenwelder, 8/3/2010 8:04 AM
Edit Del	Case Layout	Jerry Odenwelder, 8/2/2010 2:08 AM	Jerry Odenwelder, 8/2/2010 2:08 AM

Case Close Page Layouts			
		New	Page Layout Assignment
Action	Page Layout Name	Created By	Modified By
Edit Del	Close Case Layout	Jerry Odenwelder, 8/2/2010 2:08 AM	Jerry Odenwelder, 8/2/2010 2:08 AM

This layout contains all of the Case Connect fields, but it does not contain any Case Page Layout customization you may already have in your environment. It is included in the Case Connect package for testing and as a model if you need to add the Case Connect fields to an existing Case Layout. If you have not customized your existing Salesforce.com Case Layout, you may find that replacing it with this layout is satisfactory. Detail instructions for replacing a Case layout are found in the Salesforce.com Help system. In short you need to:

1. Click **Page Layout Assignment**
2. Click **Edit Assignment**
3. Select the Profiles you wish to modify
4. Select the desired Page Layout. For example, select “Case (VersionOne) Layout”
5. Click **Save**

The following sections describe the Case Connect Fields in more detail.

Case Connect Fields

Case Connect requires 2 fields and 2 Visual Force Pages on the Case Layout.

ID	Field Name	Description
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ID	Field Name	Description
1	VersionOne Development Status	A text field that holds the VersionOne Development Status value once it's published.
2	Search VersionOne Defects	A Visual Force Page that allows users to Search VersionOne for Defects matching the provided criteria. Users can assign a defect from the search results.
3	VersionOne Defect	A Visual Force Page to displays information about the associated VersionOne Defect. Once a Defect is associated, users can choose to publish the VersionOne defect status or unassign the VersionOne Defect. The VersionOne Defect Status is published to the "VersionOne Development Status" field on the Salesforce Case.
	VersionOne Association	A read-only hidden checkbox that indicates if the Case has a VersionOne association. This field is used by the integration and should not be manually edited. This field is not visible on the image below.

Case Detail

Edit
Delete
Close Case
Clone

Case Owner	Jerry Odenwelder Change	Status	New
Case Number	00005192	Priority	Medium
Contact Name		Contact Phone	
Account Name		Contact Email	
Type		Case Origin	Web

Case Reason

VersionOne Development status

1

Date/Time Opened	5/31/2010 5:01 AM	Date/Time Closed	
Potential Liability		Engineering Req Number	
Product		SLA Violation	
Created By	Jerry Odenwelder , 5/31/2010 5:01 AM	Last Modified By	Jerry Odenwelder , 8/4/2010 3:23 PM
Subject	Test case		
Description			
Custom Links	Up-sell / Cross-sell Opportunity		

2

Search VersionOne Defects

Find in All ☐ Include closed Defects [Search](#)

3

VersionOne Defect

[Create](#)