Remote Support
Salesforce Integration
# Table of Contents

- BeyondTrust Remote Support Integration with Salesforce ........................................... 3
  - Prerequisites for the BeyondTrust Remote Support Integration with Salesforce .......... 4
    - Base Integration Requirements ............................................................................. 4
    - Firewall Test ....................................................................................................... 4
  - Configure BeyondTrust Remote Support for Integration with Salesforce .................. 6
    - Verify the API Is Enabled .................................................................................... 6
    - Create an API Service Account - BeyondTrust 16.1 and Earlier ............................ 6
    - Create an API Service Account - BeyondTrust 16.2 and Later .............................. 7
    - Add an Outbound Event URL .............................................................................. 7
  - Configure Salesforce for Integration with BeyondTrust Remote Support ................. 9
    - Install BeyondTrust Managed Package .............................................................. 9
    - Install BeyondTrust Unmanaged Package .......................................................... 10
    - Create New Remote Site ..................................................................................... 10
    - Set Up Integration Mapping ............................................................................... 11
    - Customize Case Page Layout .............................................................................. 11
    - Add Show Case ID Button ................................................................................... 12
    - Add Quick Actions (for Lightning UX only) ........................................................ 12
    - Add Case Field to BeyondTrust Session Layout ................................................. 13
    - Add BeyondTrust Username to User Layout ...................................................... 13
    - Assign Permission Sets ....................................................................................... 13
    - Create New BeyondTrust Site .............................................................................. 14
    - Import BeyondTrust Session Event Types .......................................................... 15
  - Test the Integration between Salesforce and BeyondTrust Remote Support ............. 17
    - Test Session Key Generation ............................................................................... 17
    - Test BeyondTrust Session Import ....................................................................... 17
    - Test Session Key Generation (for Lightning UX only) ........................................... 18
BeyondTrust Remote Support Integration with Salesforce

IMPORTANT!

You must purchase this integration separately from both your Remote Support software and your Salesforce solution. For more information, contact BeyondTrust sales.

Service desks and customer support organizations using Salesforce.com can integrate with BeyondTrust to improve service levels, centralize support processes, and strengthen compliance. This document describes the installation and configuration of the BeyondTrust Remote Support integration with Salesforce.

The Salesforce integration with BeyondTrust Remote Support provides the following functionality:

- **Outbound Support Sessions**: Technicians can launch BeyondTrust sessions from within Salesforce cases using the Generate Session Key button.

- **Session Updates**: BeyondTrust session data is written back to Salesforce tickets. The integration includes chat transcripts, system information, session notes, customer and representative surveys, session recordings, and more details about each BeyondTrust session.
Prerequisites for the BeyondTrust Remote Support Integration with Salesforce

Outlined below are requirements for the BeyondTrust integration with Salesforce.com. If any of the integration requirements are not yet met, they must be in place prior to starting the integration setup process unless the associated features of the integration are not required.

IMPORTANT!

As of summer 2016, Salesforce.com now supports a new user interface called Lightning. This interface is vastly different from the classic Salesforce.com interface. For the purposes of this installation guide, we advise that you switch to the classic Salesforce.com user interface, and we assume that you are using that interface to complete the installation of this integration. This guide discusses the Lightning UI only in a few locations.

Base Integration Requirements

- Secure Remote Access Appliance (physical or virtual) with:
  - BeyondTrust Remote Support: 14.2.x and newer
  - At least one usable representative console which can generate session keys
  - A working BeyondTrust public site through which users can connect to representatives
- Network firewall rules to allow:
  - TCP 443 traffic from the Secure Remote Access Appliance to reach the appropriate Salesforce.com instance
  - TCP 443 traffic from the appropriate Salesforce.com instance to reach the Secure Remote Access Appliance
- A working Salesforce.com instance.

Firewall Test

It is important to test all requirements of the integration prior to beginning setup. Most of these can be tested by the BeyondTrust and Salesforce.com administrators within their respective systems, but to test the network firewall, the BeyondTrust admin should take the following steps to confirm that the necessary rules are in place:

1. Log into a machine either external to the Secure Remote Access Appliance's network or in the same VPN as the Salesforce.com instance, depending on how Salesforce.com connects to the appliance's network.
3. Browse to Support > Utilities :: TCP Connection Test.
4. Enter the hostname of the Salesforce.com instance, enter the port number of 443, and click Test. The result should be a Connected status message.
Note: Do not enter the protocol of the Salesforce.com instance (e.g., https://salesforce.example.com/). Instead, use the fully qualified domain name only (e.g., salesforce.example.com). In most environments, the Secure Remote Access Appliance resides in a DMZ network and has a public DNS address, which Salesforce.com contacts over the public internet. In some environments, BeyondTrust is not publicly accessible. In these cases, you should communicate with your technical contact about implementing a VPN connection to your internal network for Salesforce.com.
Configure BeyondTrust Remote Support for Integration with Salesforce

All of the steps in this section take place in the BeyondTrust /login administrative interface. Access your Remote Support interface by going to the hostname of your Secure Remote Access Appliance followed by /login (e.g., https://support.example.com/login).

Verify the API Is Enabled

This integration requires the BeyondTrust XML API to be enabled. This feature is used by the BeyondTrust Middleware Engine to communicate with the BeyondTrust APIs.

Go to /login > Management > API Configuration and verify that Enable XML API is checked.

Create an API Service Account - BeyondTrust 16.1 and Earlier

The API user account is used from within the integration to make BeyondTrust Command API calls to BeyondTrust.

2. Click Create New User and name it Integration or something similar.
3. Leave Must Reset Password at Next Login unchecked.
5. Set Allowed to View Support Session Reports to View All Sessions.
6. Check Allowed to view support session recordings.
7. Set Allowed to View Presentation Session Reports to View All Sessions.
8. Check Allowed to Use Reporting API and Allowed to Use Command API.
9. Scroll to the bottom and save the account.
Create an API Service Account - BeyondTrust 16.2 and Later

1. Go to Management > API Configuration and click Add to create a new API account.
2. Provide a name for the API account.
3. Under Permissions, check Full Access to the Command API.
4. For the Reporting API, check Allow Access to Support Session Reports and Recordings and Allow Access to Presentation Session Reports and Recordings.
5. Be sure to copy the values for both the OAuth Client ID and OAuth Client Secret for use in a later step.
6. Click Save to create the account.

Add an Outbound Event URL

1. Go to /login > Management > Outbound Events.
2. In the HTTP Recipients section, click Add and name it Integration or something similar.
3. Enter the URL to use:
   - If using an appliance ID of "default":
     http://<middleware-host>:<port>/ERSPost. The default port is 8180.
   - If using an appliance ID other than "default":
     http://<middleware-host>:<port>/ERSPost?appliance=<appliance-id> where <middleware-host> is the hostname where the BeyondTrust Middleware Engine is installed. The default port is 8180. The <appliance-id> is an arbitrary name, but note the value used, as it is entered later in the plugin configuration. This name accepts only alphanumeric values, periods, and underscores.
4. Scroll to Events to Send and check the following events:
   - Support Session End
   - Customer Exit Survey is Completed
   - Representative Survey is Completed
   - Someone Joins a Support Session (Optional)
5. Click Save.
6. Now, the list of outbound events should contain the event just added. The Status column displays a value of OK if
communication is working. If communication is not working, the **Status** column displays an error which you can use to repair communication.
Configure Salesforce for Integration with BeyondTrust Remote Support

Unless otherwise noted, all of the steps in this section take place in the Salesforce.com interface. The development and/or test instances of Salesforce.com should be used initially so that the integration can be thoroughly tested before installation in the production instance.

Install BeyondTrust Managed Package

1. Enter the managed package installation URL into the browser, and then click the Continue button.

   **Note:** You can obtain the managed package installation URL from your BeyondTrust technical contact.

2. Select Install for Admins Only and click the Install button.

3. Once you see the Installation Complete message, click the Done button to return to Salesforce.com setup.
Install BeyondTrust Unmanaged Package

1. Enter the unmanaged package installation URL into the browser, and then click the Continue button.

*Note:* You can obtain the unmanaged package installation URL from your BeyondTrust technical contact.

2. Select Do not install as the option for What if existing component names conflict with ones in this package.
3. Select Install for Admins Only and click the Install button.

4. Once you see the Installation Complete message, click the Done button to return to Salesforce.com setup.

Create New Remote Site

1. In Salesforce.com, click the link labeled Sales in the upper right corner of the screen, and select BeyondTrust Integration.
   a. Under Administer > Security Controls > Remote Site Settings, click the New Remote Site button. Enter the following values:
      i. Remote Site Name: BeyondTrust
      ii. Remote Site URL: https://support.example.com (your Secure Remote Access Appliance hostname)
   b. Click the Save button.
Set Up Integration Mapping

1. In Salesforce.com, go to Develop > Custom Settings and click the Manage link next to the item labeled Integration Mapping.
2. Click the New button directly above the list of settings.
3. Enter the following:
   a. Name: 500
   b. BeyondTrust Field Name: external_key
   c. Salesforce Field Name: Case_c
4. Click the Save button.

Customize Case Page Layout

1. In Salesforce.com, go to Customize > Cases > Page Layouts and click the Edit button next to Case Layout.
2. In the menu box at the top, select Buttons, and then drag the Generate Session Key or BeyondTrust Session Key button to the Custom Buttons section.

Note:
These two buttons are different.

Generate Session Key - Generates the session key server-side via the BeyondTrust Command API and provides the user with a dialog containing three things: 1) session key, 2) session key URL, and 3) email session key to customer button.

BeyondTrust Session Key - Generates a session key URL via the BeyondTrust Scripting API that essentially launches the representative console with the standard session key dialog displayed therein.
3. In the menu box at the top, select Related Lists, and then drag the BeyondTrust Sessions related list to the Related Lists section.

4. Scroll down the page and find the BeyondTrust Sessions section under Related Lists, and then click the wrench icon to edit its properties.

5. Add the following fields from Available to Selected in this order:
   a. Primary Customer
   b. Primary Representative
   c. Start Time
   d. End Time
   e. Duration


7. Expand the Buttons section and make sure New is unchecked.

8. Click OK.

9. Click the Save button in the menu box at the top to save the layout.

Add Show Case ID Button

1. Under Customize > Cases > Page Layouts, click the Edit button next to Case Layout.

2. In the menu box at the top, select Buttons, and then drag the Show Case ID button to the Custom Buttons section. This allows technicians to easily get the case ID.

Add Quick Actions (for Lightning UX only)

1. In Salesforce.com, go to Customize > Cases > Page Layouts, and click the Edit button next to Case Layout.

2. In the menu box at the top, select Quick Actions, and then drag the BeyondTrust Jump and/or Session Key quick actions to the Quick Actions section in the Salesforce Classic Publisher section.

3. Click the Save button in the menu box at the top to save the layout.

4. Go back into the layout you just saved by clicking the Edit button next to its listing.

5. Find the section titled Salesforce1 and Listing Experience Actions, hover over it, and then click the wrench icon.

6. You should now see the BeyondTrust Jump and Session Key quick actions listed in this section.

7. Click the Save button in the menu box at the top to save the layout.

8. Next, remove the quick actions from the Quick Actions section in the Salesforce Classic Publisher section by editing the page layout once more and dragging the BeyondTrust Jump and Session Key quick actions out of the section and back to the menu box.

**Note:** These quick actions are designed solely for the Lightning UX.
Add Case Field to BeyondTrust Session Layout

1. Select the **BeyondTrust Integration** app, and then click the **BeyondTrust Sessions** tab.
2. Click the arrow that is docked to the right side of the screen and click the **View Object** link.
3. Click the **Page Layouts** link located directly beneath the page title.
4. Click the **Edit** link for the **BeyondTrust Session Layout**.
5. From the **Fields** menu, drag the **Case** element to the **Information** section under **BeyondTrust Session Detail**.
6. Click the **Save** button in the menu box at the top to save the layout.

Add BeyondTrust Username to User Layout.

1. In Salesforce.com, go to **Setup** from the header menu.
2. Under **Customize > Users > Page Layouts**, click the **Edit** button next to **User Layout**.
3. Drag the **BeyondTrust Username** field to the **Additional Information** section.
4. Click the **Save** button in the menu box at the top to save the layout.

Assign Permission Sets

1. In Salesforce.com, go to **Setup** from the header menu.
2. Under **Administer > Manage Users > Permission Sets**, click the **BeyondTrust Representative** permission set.
3. Click the **Manage Assignments** button.

4. Click the **Add Assignments** button.

5. Select users and click the **Assign** button to assign this permission set to the appropriate users.

6. Click the **Done** button.

7. Repeat these steps for the **BeyondTrust Representative - BeyondTrust Case Integration** permission set.

---

**Create New BeyondTrust Site**

1. In Salesforce.com, go to **Setup** from the header menu.
2. Under **Develop > Sites**, click the **New** button.
3. Enter the following information:
   a. **Site Label**: BeyondTrust
   b. **Site Name**: BeyondTrust
   c. **Active**: [checked]
   d. **Default Web Address**: [BeyondTrust site address]
   e. **Active Site Homepage**: [Search for SiteLogin and add it as the homepage]
4. Click the **Save** button.
5. For the site you just added, click **BeyondTrust** under the **Site Label** column.
6. Click the **Edit** button next to **Site Visualforce Pages**.

7. Add **BGIntegration.SessionUpdateHandler** to the list of **Enabled Visualforce Pages**.

8. Click **Save**.

**Import BeyondTrust Session Event Types**

1. In Salesforce.com, go to **Setup** from the header menu.
2. Under **Administer > Data Management > Data Import Wizard**, click **Launch Wizard**.

3. Click **Custom objects > BeyondTrust Event Types**.

4. Click **Add new records**.
5. Click **CSV**, and then click the **Choose File** button and select the **BeyondTrust Event Types.csv** file.

**Note:** This CSV file is provided by the BeyondTrust implementation team.
6. Click Next.
7. Click the Map link, click BeyondTrust Event Type Name, and then click the Map button.

8. Click Start Import.

9. Click OK and verify that Records Processed: 53 and Status: Completed.
10. Click Next.

Configure Secure Remote Access Appliance

1. Select the BeyondTrust Integration app, and then click Configuration.
2. Click New.
3. Enter the following information:
   a. Appliance Name: <Default> (If you have only one appliance, it must be named Default.)
   b. Hostname: <Your Secure Remote Access Appliance hostname>
   c. Username: <BeyondTrust API username>
   d. Password: <BeyondTrust API password>
   e. Import All BeyondTrust Sessions: Check if you want to import BeyondTrust session data for sessions that were not initiated from within Salesforce.com.
   f. Supported Public Portals: A comma-separated list of public portals by name only (e.g., Default) that the integration supports OR leave empty if you are supporting only a single public portal.
   g. Event Types: Move all supported event types from the Available Event Types list to the Selected Event Types list.
4. Click Save.
Test the Integration between Salesforce and BeyondTrust Remote Support

The following steps take place in Salesforce.com and BeyondTrust and are provided to ensure that the integration works properly. Troubleshooting suggestions are provided with each step in case of failure.

Test Session Key Generation

1. Log into the BeyondTrust representative console, and then log into Salesforce.com with the same account. If BeyondTrust and Salesforce.com use different authentication systems, manually assign your BeyondTrust user to your Salesforce.com user via the User Layout in Salesforce.com.
2. Open a case in Salesforce.com.
3. To test client-side session key generation, click the BeyondTrust Session Key button. This should launch the BeyondTrust representative console, subsequently opening the session key dialog box.
4. To test server-side session key generation, click the Generate Session Key button. This should launch a window within Salesforce.com that displays the session key information. In case of failure, make sure the following are true:
   a. The Salesforce.com user account is mapped to a BeyondTrust user account as described in this guide.
   b. The Salesforce.com API user connection test completes successfully.
   c. The BeyondTrust Hostname, Username, and Password fields are set correctly in Salesforce.com under Configuration.

Test BeyondTrust Session Import

1. Log into Salesforce.com as an ITIL user or an admin. Use the BeyondTrust Session Key or Generate Session Key button as described above to start a BeyondTrust session.
2. End the session from the representative console and close any surveys and/or session end messages on the representative and/or customer sides of the session.
3. Refresh the Salesforce.com case from which the session key was generated, scroll down, and check the BeyondTrust Sessions list. There should be an entry for the recent session. If not, make sure the following are true:
   a. The API user connection test completes successfully.
   b. There are no BeyondTrust errors reported for your Salesforce.com instance in the BeyondTrust /login > Management > Outbound Events list.
   c. Make sure no errors are shown in Salesforce.com under the Error Logs tab, which can be seen when the BeyondTrust Integration tab is selected.
Test Session Key Generation (for Lightning UX only)

1. Log into the BeyondTrust representative console, and then log into Salesforce.com with the same account. If BeyondTrust and Salesforce.com use different authentication systems, manually assign your BeyondTrust user to your Salesforce.com user via the user layout in Salesforce.com.

2. Ensuring that you are in the Salesforce Lightning UX, open a case in Salesforce.com.

3. Click the Session Key tab. You should see the Session Key, the Session Key URL, and the Email Session Key button.

4. Additionally, you should see a Generate Session Key button that can be used to generate a session key (client-side) with the BeyondTrust representative console.

5. Click the Generate Session Key button. This should launch the BeyondTrust representative console, subsequently opening the session key dialog box.