Remote Support
Salesforce Integration Use Case
# Table of Contents

**Salesforce Integration Overview** .......................................................... 3

Integration Summary .............................................................................. 3

High Level Integration Information ...................................................... 3

**Salesforce Integration Use Cases** ..................................................... 4

Generate Session Key ........................................................................... 4

Import Remote Support Session Data into a Salesforce Record ............... 4

Jump to Configuration Item .................................................................. 5

Access Salesforce Records from Rep Console ........................................ 5

Manually Associate Sessions with Salesforce Records .......................... 5

**Integration Screenshots** .................................................................... 6

Generate Session Key Button ................................................................. 6

Generate Session Key Dialog (on Help Desk Form) ................................. 6

BeyondTrust Session List .................................................................... 7

BeyondTrust Session Detail .................................................................. 8

BeyondTrust Integration Settings ......................................................... 9
Salesforce Integration Overview

**IMPORTANT!**

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

Integration Summary

The integration of BeyondTrust with Salesforce adds functionality that provides the means to initiate a support session from the Salesforce Case interface and, at the end of the session, to update the case with the following information:

- Chat Transcript
- File Transfers
- System Information
- Session Notes
- Exit Surveys (Customer and Representative)
- Recordings (Links Only)

High Level Integration Information

<table>
<thead>
<tr>
<th>Data Source</th>
<th>BeyondTrust</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Destination</td>
<td>Salesforce.com Case</td>
</tr>
<tr>
<td>Direction</td>
<td>Both-way</td>
</tr>
<tr>
<td>Push/Pull</td>
<td>Push and Pull</td>
</tr>
<tr>
<td>Integration Mechanism</td>
<td>BeyondTrust API</td>
</tr>
</tbody>
</table>
Salesforce Integration Use Cases

Service desks and customer support organizations using Salesforce can integrate with BeyondTrust Remote Support to improve service levels, centralize support processes, and strengthen compliance. Use cases addressed by the BeyondTrust Remote Support and Salesforce integration are listed below.

Generate Session Key

A technician can generate a session key from within a case. This session key can be given to a customer to initiate a support session.

Once the support session ends, a detailed report of the session is imported into Salesforce and associated with the case from which the session key was generated.

Import Remote Support Session Data into a Salesforce Record

Once the Remote Support session ends, Salesforce is automatically updated with information gathered during the support session, including:

- Chat Transcript
- File Transfer Information
- Session Notes
- Customer System Information
- Representatives Involved
- Customers Involved
- Teams Involved
- Session Recordings
- Customer and Representative Survey Results
Jump to Configuration Item

A technician can leverage Remote Support Jump Technology to access a Remote Support Jump Client directly from a case.

Once the support session ends, a detailed report of the session is imported into Salesforce and associated with the case from which the session was started.

Access Salesforce Records from Rep Console

Using Remote Support's custom links ability, a representative can access the associated Salesforce record directly from within the representative console. This saves time searching for the record in Salesforce and provides the representative with any available issue details, history, or other context to help quickly resolve the issue.

Manually Associate Sessions with Salesforce Records

Whether a representative has just created a case for the current session or has found that one already exists, even sessions originating outside the scope of a Salesforce record can be manually associated with the appropriate item, allowing session details to be automatically added to the case when the session ends.

To make this association, enter the numeric ID of the case into the **External Key** field while in session. You can use the human readable record number from Salesforce to easily make this association.
Integration Screenshots

Generate Session Key Button

Case Detail

- **Case Owner**: Scott Archer [Change]
- **Case Number**: 00001004
- **Contact Name**: Joe Smith
- **Account Name**:
- **Type**:
- **Date/Time Opened**: 5/14/2012 12:50 PM
- **Date/Time Closed**:
- **Product**: Engineering Req Number
- **Potential Liability**: SLA Violation
- **Created By**: Scott Archer, 5/14/2012 12:50 PM
- **Last Modified By**: Scott Archer, 5/14/2012 12:50 PM
- **Subject**: E-mail Connectivity Problems
- **Description**: I can't access my e-mail.
- **Custom Links**: Up-sell/Cross-sell Opportunity

Generate Session Key Dialog (on Help Desk Form)
### BeyondTrust Session List

#### Case Bomgar Sessions

<table>
<thead>
<tr>
<th>Action</th>
<th>Bomgar Session ID</th>
<th>Session Start Date</th>
<th>Session End Date</th>
<th>Primary Support Rep Name</th>
<th>Customer Name</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Del</td>
<td>c090cd481cd1478c598359740ea7ad</td>
<td>5/21/2012 7:03 AM</td>
<td>5/21/2012 7:09 AM</td>
<td>Admin</td>
<td>Scott Archer</td>
<td>00:06</td>
</tr>
<tr>
<td>Del</td>
<td>64b6b142d04224f102a1915e0927</td>
<td>5/21/2012 7:49 AM</td>
<td>5/21/2012 7:49 AM</td>
<td>Admin</td>
<td>Scott Archer</td>
<td>00:00:21</td>
</tr>
<tr>
<td>Del</td>
<td>22b4465220d04b509c3bd8f879e2c</td>
<td>5/21/2012 8:02 AM</td>
<td>5/21/2012 8:03 AM</td>
<td>Admin</td>
<td>Scott Archer</td>
<td>00:01:24</td>
</tr>
<tr>
<td>Del</td>
<td>5e2a2f0a98980b9d2556a9f8734c8a</td>
<td>5/21/2012 8:53 AM</td>
<td>5/21/2012 8:54 AM</td>
<td>Admin</td>
<td>Scott Archer</td>
<td>00:01:14</td>
</tr>
<tr>
<td>Del</td>
<td>3eaa5927545084c589e673a3a092</td>
<td>5/21/2012 9:22 AM</td>
<td>5/21/2012 9:22 AM</td>
<td>Admin</td>
<td>Scott Archer</td>
<td>00:00:14</td>
</tr>
<tr>
<td>Del</td>
<td>16a1f002374eb5a153e8d4d1d35489</td>
<td>5/21/2012 9:35 AM</td>
<td>5/21/2012 9:36 AM</td>
<td>Admin</td>
<td>Scott Archer</td>
<td>00:00:30</td>
</tr>
<tr>
<td>Del</td>
<td>86d57868d042378d8338e359d0adb9</td>
<td>5/21/2012 8:41 AM</td>
<td>5/21/2012 8:42 AM</td>
<td>Admin</td>
<td>Scott Archer</td>
<td>00:00:54</td>
</tr>
</tbody>
</table>

#### Case Comments

No records to display
# BeyondTrust Session Detail

## Bomgar Session Detail

<table>
<thead>
<tr>
<th>Bomgar Session ID</th>
<th>Hostname</th>
</tr>
</thead>
<tbody>
<tr>
<td>5811c78052d042375d4313b43e0cf89</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Salesforce Record ID</th>
<th>OS</th>
</tr>
</thead>
<tbody>
<tr>
<td>5d3dc00033032860</td>
<td>Windows 7 Enterprise x64 Edition (Build 7601)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Customer Name</th>
<th>Public IP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scott Archer</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Primary Support Rep Name</th>
<th>Private IP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session Start Date</th>
<th>Session End Date</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/21/2012 8:41 AM</td>
<td>02/21/2012 8:42 AM</td>
<td>00:01:54</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Session Recording URL</th>
<th>Created By</th>
<th>Last Modified By</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>SelfService Site Guest User, 02/21/2012 8:42 AM</td>
<td>SelfService Site Guest User, 02/21/2012 8:42 AM</td>
</tr>
</tbody>
</table>

### Chat - Show Less Details

(2012-06-21 15:41:11) Bomgar added the following note. A secure encrypted SSL connection has been established.

(2012-06-21 15:41:11) Bomgar added the following note. Your support representative will be with you shortly. This session may be recorded for quality assurance.

(2012-06-21 15:41:20) Admin added the following note. This is a test.

(2012-06-21 15:41:24) Scott Archer added the following note. This is a test.

(2012-06-21 15:41:33) Bomgar added the following note. The customer has allowed file system access to Admin.

(2012-06-21 15:41:33) Bomgar added the following note. Admin is now viewing the customer's file system.

(2012-06-21 15:41:51) Bomgar added the following note. Admin has stopped viewing the customer's file system.

### File Transfers - Show More Details

### Representative Survey - Show More Details

### System Information - Show More Details
BeyondTrust Integration Settings

Bomgar Integration Settings

Use SSL

Bomgar Instance Name (i.e. customer.bomgar.com)

Bomgar API User Name

Bomgar API Password

Include Full Chat Details

Include System Information

Display links to View Command Shell and Session Recording URLs

Include Session Notes entered to Technician

Include Customer Exit Surveys

Include Representative Exit Surveys

Post Session Requests to Chatter

Apply | Test Connectivity