Remote Support Salesforce Integration

TC:3/4/2024

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BeyondTrust Remote Support Integration with Salesforce

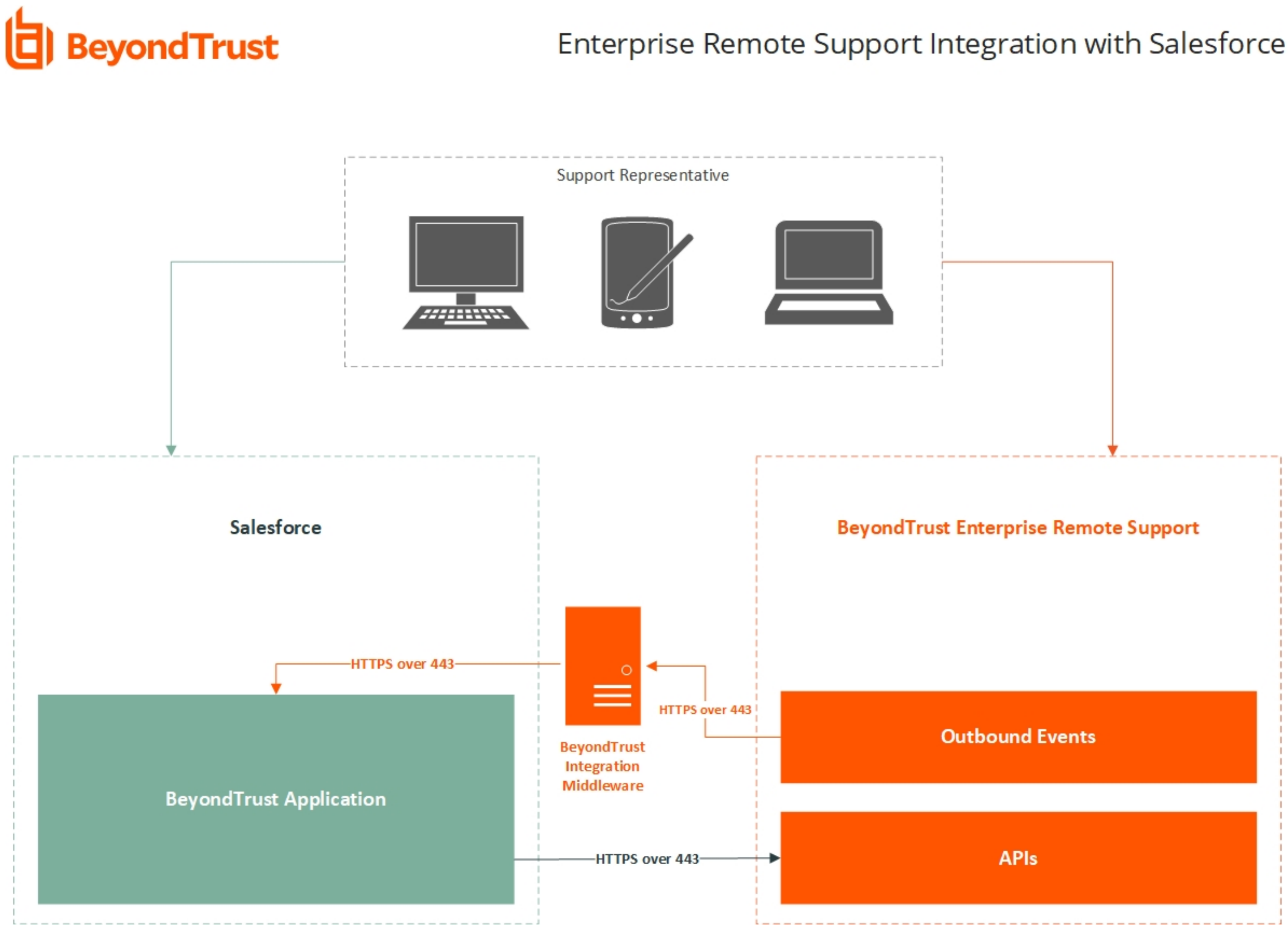
IMPORTANT!

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

Service desks and customer support organizations using Salesforce.com can integrate with BeyondTrust to centralize their support processes, improve their service levels, and strengthen compliance.

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.


BeyondTrust
Enterprise Remote Support Integration with Salesforce
Support Representative
Salesforce
BeyondTrust Enterprise Remote Support
HTTPS over 443
HTTPS over 443
Outbound Events
BeyondTrust Integration Middleware
BeyondTrust Application
APIs
HTTPS over 443

Use Cases

Overview

The BeyondTrust Salesforce integration allows you 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)

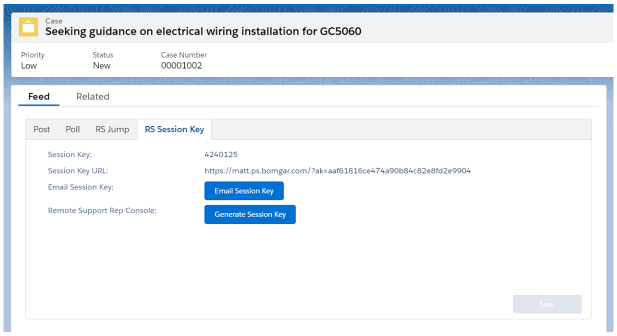
High Level Integration Information

Data Source	BeyondTrust
Data Destination	Salesforce.com Case
Direction	Both-way
Push/Pull	Push and Pull
Integration Mechanism	BeyondTrust API

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.

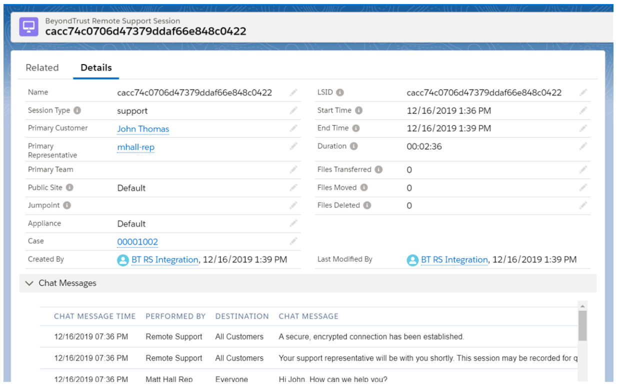
Once the support session ends, a detailed report of the session is imported into Salesforce and associated with the case from which the session key was generated.



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:

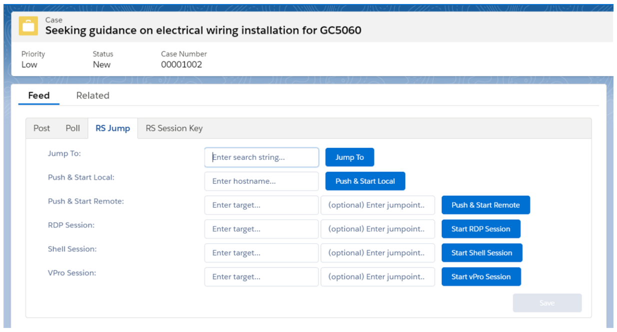
- Chat Transcript
- File Transfer Information
- Session Notes
- Customer System Information
- Representatives Involved
- Customers Involved
- Teams Involved
- Session Recordings
- Customer and Representative Survey Results



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.

Prerequisites for the BeyondTrust Remote Support Integration with Salesforce

The requirements to integrate BeyondTrust with Salesforce.com are outlined below. Unless the associated features of an integration component are not used, all of these requirements must be in place prior to starting the integration setup.

Base Integration Requirements

1. A working Salesforce instance
2. BeyondTrust BeyondTrust Appliance B Series (physical or virtual) with:
   - Version 17.x or later
   - At least one usable representative console that can generate session keys
   - A working BeyondTrustRemote Support public site through which users can connect to representatives
3. Installed BeyondTrust Middleware
4. Network firewall rules to allow:
   - CP 443 traffic from the BeyondTrust Appliance B Series to reach the Integration Middleware
   - TCP 443 traffic from the Integration Middleware to reach the appropriate Salesforce instance
   - TCP 443 traffic from the appropriate Salesforce instance to reach the BeyondTrust Appliance B Series

IMPORTANT!

The Salesforce Integration Plugin must also be installed and configured once this installation guide has been completed. The integration does not work without the plugin. The plugin installation is outlined in a separate document.

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 in to a machine either external to the B Series Appliance's network or in the same VPN as the Integration Middleware instance, depending on how Salesforce connects to the B Series Appliance's network.
2. Log in to the B Series Appliance's **/appliance** interface.
3. Browse to **Support > Utilities :: TCP Connection Test**.
4. Enter the hostname of the Integration Middleware 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 Integration Middleware instance (e.g., https://). Instead, use the fully qualified domain name only (e.g., middleware-hostname.example.com). In most environments, the B Series Appliance resides in a DMZ network and has a public DNS address, which Salesforce contacts over the public internet. In some environments, BeyondTrust is not publicly accessible. In these cases, you should Salesforce about implementing a VPN connection to your internal network for Salesforce.*

Configure Remote Support for Integration with Salesforce

Integrating Remote Support with Salesforce requires configuration updates in both applications. All of the steps in this section take place in the B Series Appliance **/login** administrative interface. Access your B Series Appliance interface by going to the host name of your B Series Appliance followed by **/login** (for example, **https://support.example.com/login**).

Verify That the API is Enabled

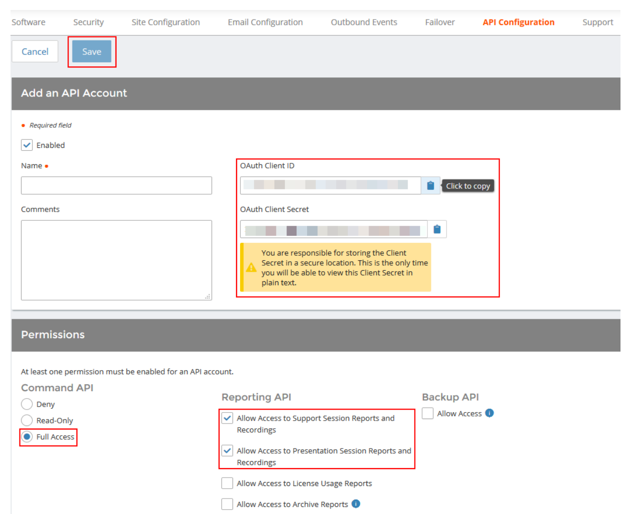
The BeyondTrust Remote Support and Salesforce Integration requires the Remote Support XML API to be enabled. This feature is used from within Salesforce to communicate with the Remote Support APIs.

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

Create an API Service Account

The Salesforce API Account is used from within Salesforce to make Remote Support Command API calls to Remote Support.

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.

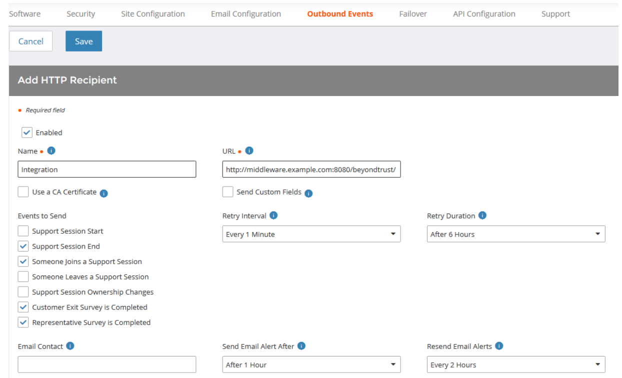


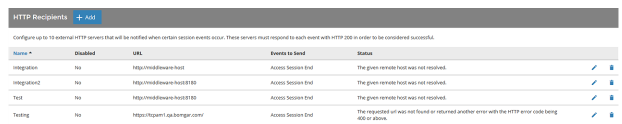
Add an Outbound Event URL

Outbound events are used to notify Salesforce of Remote Support session events, most commonly when a session ends and when exit surveys have been completed.

1. Go to **/login > Management > Outbound Events**.
2. In the **HTTP Recipients** section, click **Add** and name it **Integration** or something similar.
3. Set the URL to:

   http://<middleware.customer.com>/ERSPost?appliance=Default,
   where **<middleware.customer.com>** is the hostname of BeyondTrust Integration Middleware.
4. Scroll to **Events to Send** and check the following events:
   - **Support Session End**
   - **Customer Exit Survey is Completed**
   - **Representative Survey is Completed**
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.

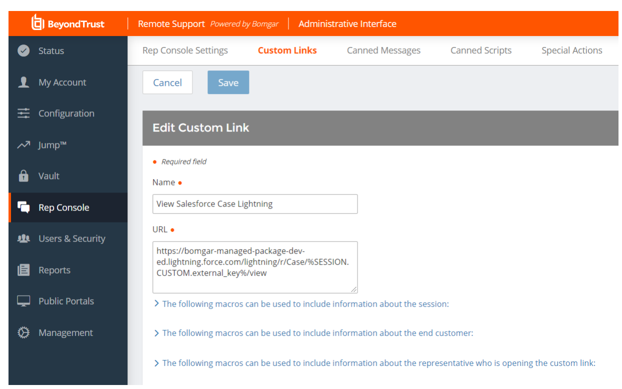




Setup Custom Link

Remote Support **Custom Links** can be configured to allow Representatives to quickly access the Salesforce case which is associated with the session.

1. Browse to **Rep Console > Custom Links**.
2. In the **Custom Links** section, click the **Add** button. Enter a name for the link, then set the URL to:
   - **Salesforce Classic**:



     https://salesforce.hostname/%SESSION.CUSTOM.external_key%
   - **Salesforce Lightning**: **https://salesforce.hostname/lightning/r/Case/%SESSION.CUSTOM.external_key%/view**

     Substitute **salesforce.hostname** with the Salesforce instance name. If needed, you can use any of the available macros to customize the link according to your specifications.
3. Click **Save** to save the new link.

Configure Salesforce for Integration with BeyondTrust Remote Support

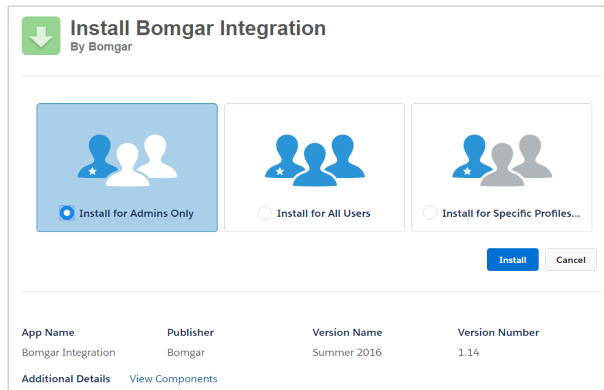
Integrating Remote Support with Salesforce requires configuration updates in both applications. Unless otherwise noted, all of the steps in this section take place in the Salesforce.com interface. The development and/or test instances of Salesforce.com should be used initially so that the integration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

Install the BeyondTrust Managed Package

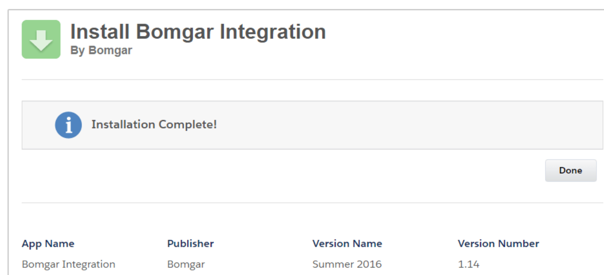
1. Enter the managed package installation URL into the browser, and then click the **Continue** button.

> ***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.

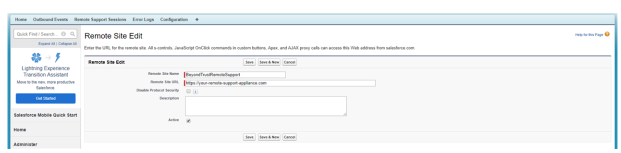


3. Once you see the *Installation Complete* message, click the **Done** button to return to Salesforce.com setup.



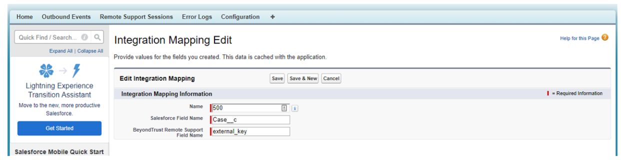
Create a New Remote Site

1. In Salesforce.com, click the link labeled **Sales** in the upper-right corner of the screen, and select **BeyondTrust RS Integration**.
2. Under **Administer > Security Controls > Remote Site Settings**, click the **New Remote Site** button. Enter the following values:
   - **Remote Site Name: BeyondTrustRemoteSupport**
   - **Remote Site URL: https://your-remote-support-appliance.com**.
3. Click the **Save** button.



Set Up Integration Mapping

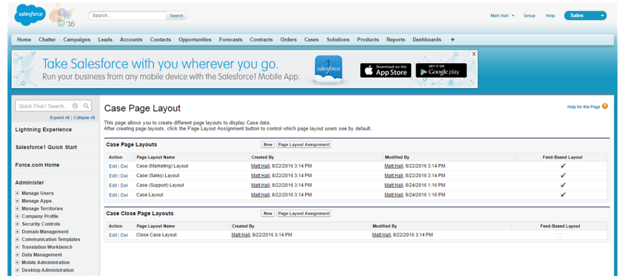
1. In Salesforce.com, go to **Develop > Custom Settings** and click the **Manage** link next to the item labeled **Integration Mapping**.
2. Click the **New** button directly above the list of settings.
3. Enter the following:
   - **Name:** 500
   - **BeyondTrust Remote Support Field Name: external_key**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



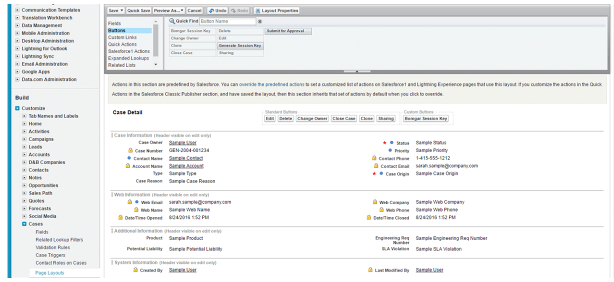
> ***Note:** there are 2 underscores in the **Field** name*

Customize the Case Page Layout

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

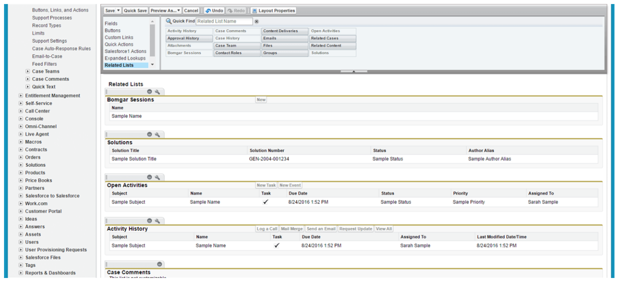


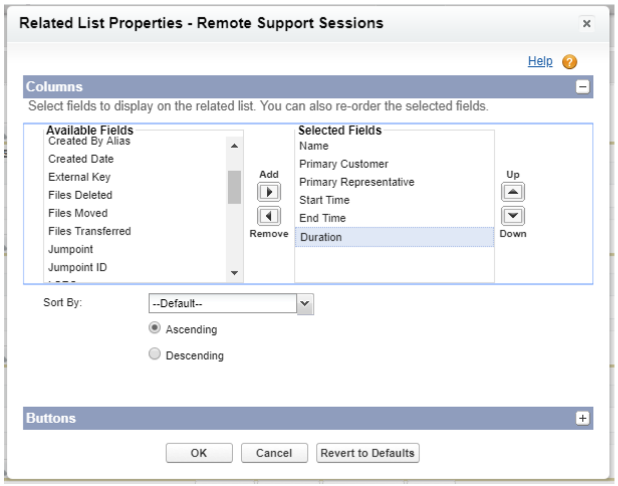
2. In the menu box at the top, select **Buttons**, and then drag the **Generate Session Key** or **BeyondTrust Session Key** button to the **Custom Buttons** section.

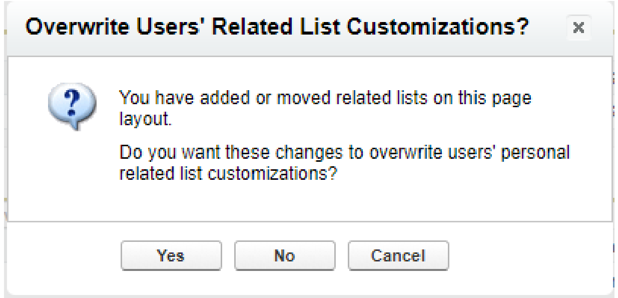


> ***Note:** These two buttons are different.*
>
> ***Generate Session Key**: Generates the session key server-side via the BeyondTrust Command API and provides the user with a dialog containing three things: 1) session key, 2) session key URL, and 3) email session key to customer button.*
>
> ***BeyondTrust Session Key**: generates a session key URL via the Remote Support Scripting API that essentially launches the rep console where the standard rep console session key dialogue is displayed.*
>
> ***Remote Support Web Session Key**: generates a session key URL via the Remote Support Scripting API that essentially launches the web console where the web session key dialogue is displayed.*
>
> ***Show Case ID**: Display the current case internal ID.*

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:
    - **Primary Customer**
    - **Primary Representative**
    - **Start Time**
    - **End Time**
    - **Duration**
6. Sort by **Start Time, Descending**.
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.
10. When prompted to **Overwrite Users Related List Customization**, click the **No** button.

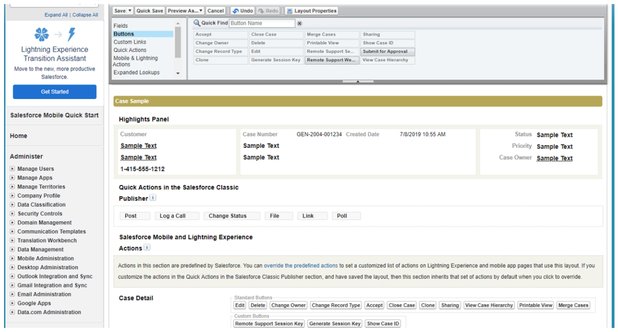






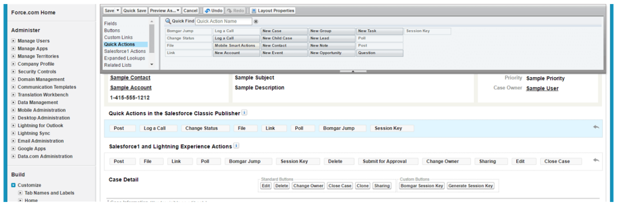
Add the Show Case ID Button

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.



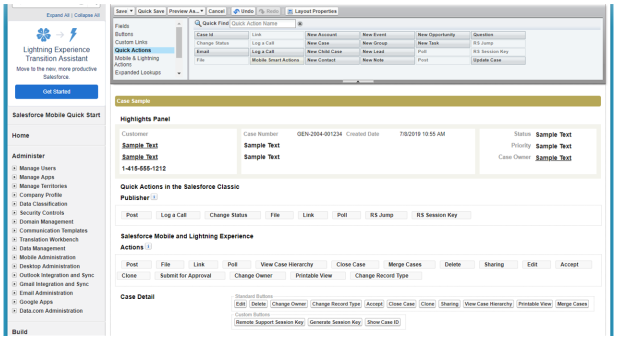
Add Quick Actions

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



Confirm Quick Actions

1. Go back into the layout you just saved by clicking the **Edit** button next to its listing.
2. Find the section titled **Salesforce1 and Lightning Experience Actions**, hover over it, and then click the wrench icon.
3. You should now see the **BeyondTrust Jump** and **Session Key** quick actions listed in this section.
4. Click the **Save** button in the menu box at the top to save the layout.



Remove Quick Actions for Salesforce Classic

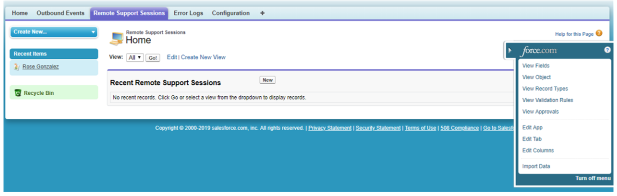
1. Next, remove the quick actions from the **Quick Actions** section in the **Salesforce Classic Publisher** section by editing the page layout once more and dragging the **BeyondTrust Jump** and **Session Key** quick actions out of the section and back to the menu box.

> ***Note:*** *These quick actions are designed solely for the Lightning UX.*

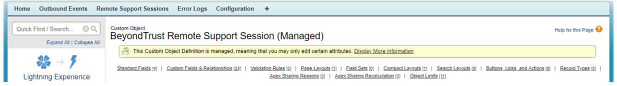
2. Under **Customize > Cases > Page Layouts**, click the **Edit** button next to **Case Layout**.
3. In the **Menu Box** at the top, click the **Save** button.

Add Case Field to Remote Support Session Layout

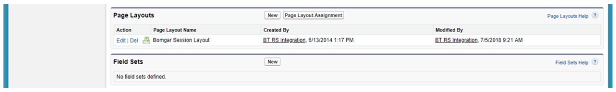
1. Select the **BeyondTrust Integration** app, and then click the **BeyondTrust Sessions** tab.
2. Click the arrow that is docked to the right side of the screen and click the **View Object** link.



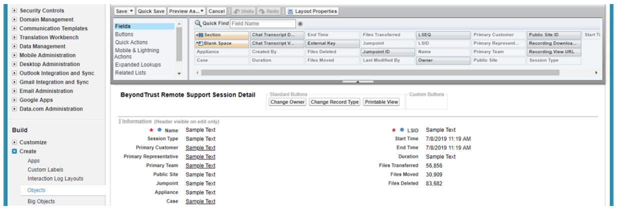
3. Click the **Page Layouts** link located directly beneath the page title.



4. Click the **Edit** link for the **BeyondTrust Session Layout**.

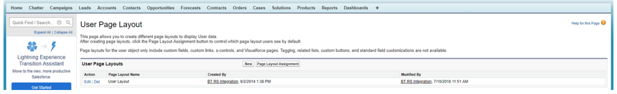


5. From the **Fields** menu, drag the **Case** element to the **Information** section under **BeyondTrust Session Detail**.
6. Click the **Save** button in the menu box at the top to save the layout.

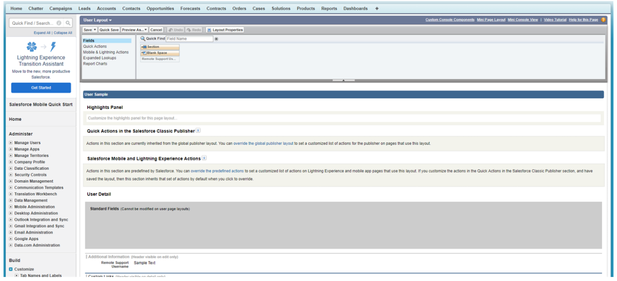


Add Remote Support Username to User Layout

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**.

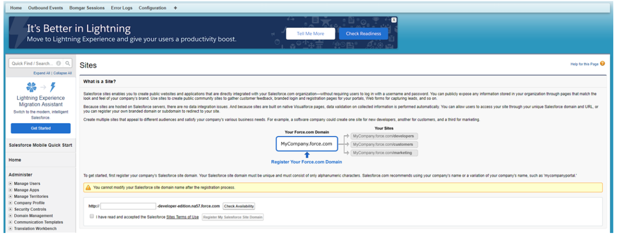


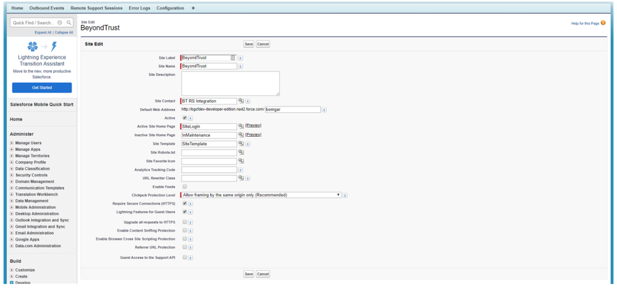
3. Drag the **BeyondTrust Username** field to the **Additional Information** section.
4. Click the **Save** button in the menu box at the top to save the layout.

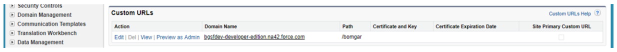


Create New BeyondTrust Site

1. In Salesforce.com, go to **Setup** from the header menu.
2. Under **Develop > Sites**, click the **New** button.
3. Enter the following information:
    - **Site Label:** BeyondTrust
    - **Site Name:** BeyondTrust
    - **Active:** [checked]
    - **Default Web Address:** [BeyondTrust site address]
    - **Active Site Homepage:** [Search for **SiteLogin** and add it as the homepage]
4. Click the **Save** button.

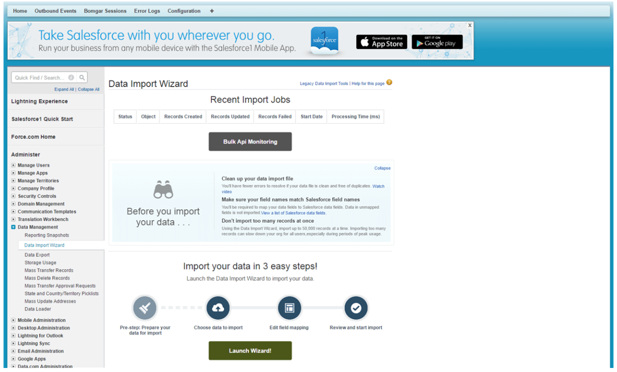




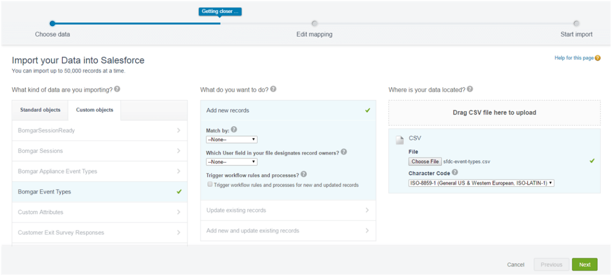


Import BeyondTrust Session Event Types

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



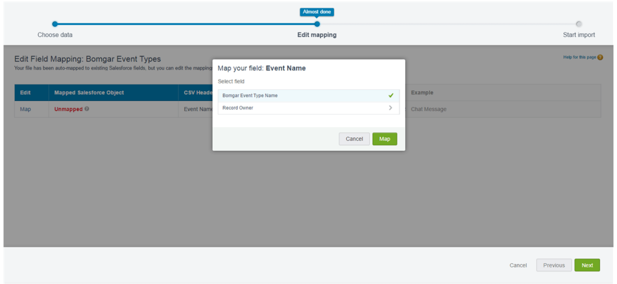
3. Click **Custom objects > BeyondTrust Event Types**.



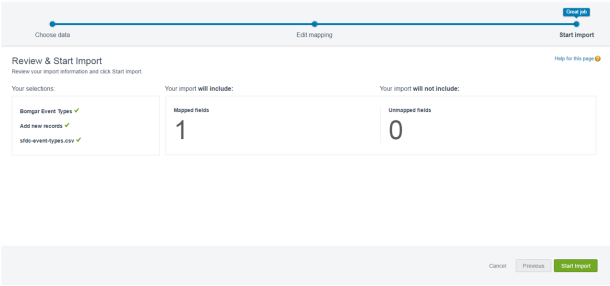
4. Click **Add new records**.
5. Click **CSV**, and then click the **Choose File** button and select the **BeyondTrust Event Types.csv** file.

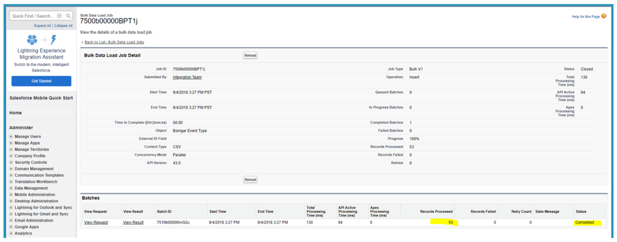
> ***Note:*** *This CSV file is provided by the BeyondTrust implementation team.*

6. Click **Next**.
7. Click the **Map** link, click **BeyondTrust Event Type Name**, and then click the **Map** button.

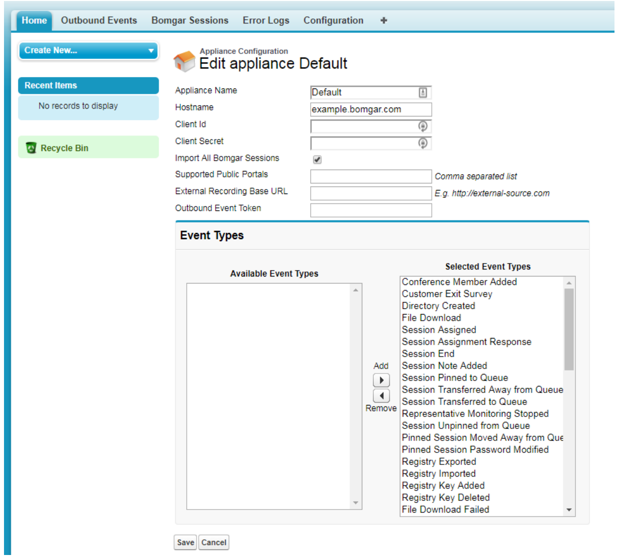


8. Click **Start Import**.
9. Click **OK** and verify that that **Records Processed** has a value of **53** and **Status** displays **Completed**.





Configure B Series Appliance



1. Select the **BeyondTrust Integration** app, and then click **Configuration**.
2. Click **New**.
3. Enter the following information:
    - **Appliance Name:** If you have only one B Series Appliance, it must be named **Default**.
    - **Hostname:** Your B Series Appliance hostname.

> ***Note:** You must have exactly one B Series Appliance named **Default**.*

  - **Client Id:** Remote Support API Client Id.
  - **Client Secret:** Remote Support API Client Secret.
  - **Import All BeyondTrust Sessions:** Check if you want to import BeyondTrust session data for sessions that were not initiated from within Salesforce.com.
  - **Supported Public Portals:** A comma-separated list of public portals by name only (for example, **Default**) that the integration supports. Leave empty if you are supporting only a single public portal.
  - **External Recording Base URL:** a URL representing the location where external recordings are stored. This is used in the Lightning Experience only, as a way to link to a Remote Support Session Recording from within the session detail view.

> ***Note: lsid=[session_lsid]** is automatically be appended to the URL as the unique identifier used in locating the session recording.*

  - **Outbound Event Token:** (optional) a secret token used to validate outbound events from the BeyondTrust Appliance B Series. To use this feature, append **&outbound_event_token=[secret_token]** to the outbound event URL on the B Series Appliance. The secret_token can be a random alphanumeric string less than 256 characters long.
  - **Event Types:** Move all supported event types from the **Available Event Types** list to the **Selected Event Types** list.
4. Click **Save**.

Salesforce Integration Plugin Configuration

Plugin Overview

The Salesforce Integration Plugin facilitates authenticated communication between the B Series Appliance and Salesforce web services to ensure the highest level of security.

> ***Note:*** *The Salesforce Integration must already be installed and configured before attempting to configure the integration plugin. Please see the* *Integration with Salesforce* *section for detailed instructions.*

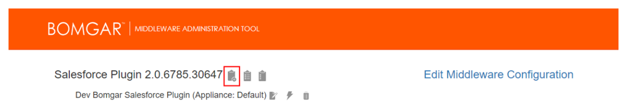
Configure the BeyondTrust Middleware for the Salesforce Plugin

All of the steps in this section take place in the BeyondTrust Remote Support Middleware Configuration interface. Access your Remote Support Middleware by going to http://<middleware.customer.com>:53231/#/overview.

For more information, please see The BeyondTrust Middleware Engine at https://www.beyondtrust.com/docs/remote-support/how-to/integrations/middleware-engine/index.htm.

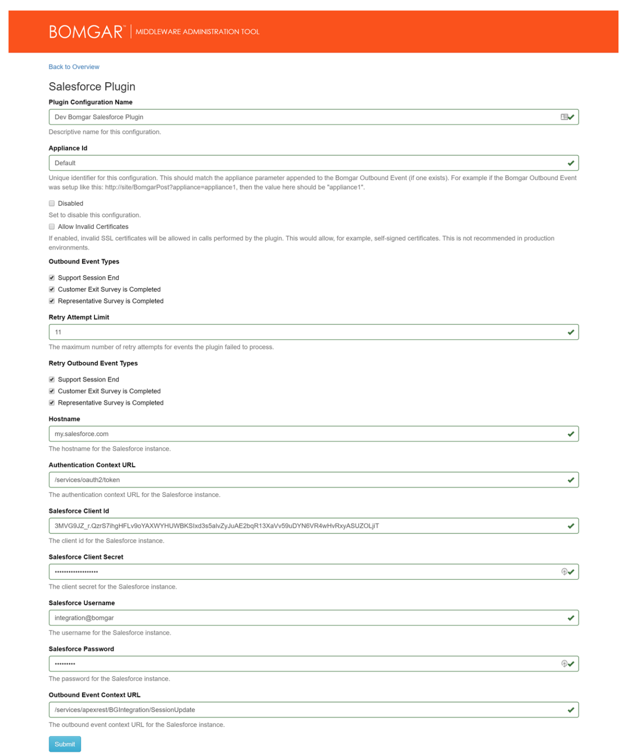
Create Salesforce Plugin Configuration

From the Middleware landing page, click the clipboard icon with the plus symbol to add a new plugin configuration.



Configure Salesforce Plugin

From the Middleware plugin configuration page, enter the following values:



- **Plugin Configuration Name**: Development Salesforce Plugin (i.e., an arbitrary value which accurately represents the configuration)
- **Appliance Id**: Default (i.e., a value that matches the Appliance Configuration name in Salesforce)
- **Outbound Event Types**: (check the boxes next to the outbound events which should be processed)
    - **Support Session End**: Indicates a session has ended. This will be required for session reports to be imported into Salesforce.
    - **Customer Exit Survey is Completed**: Indicates a customer exit survey has been completed.
    - **Representative Exit Survey is Completed**: Indicates a representative exit survey has been completed.
- **Retry Attempt Limit**: The maximum number of retry attempts for events the plugin failed to process
- **Retry Outbound Event Types**: (check the boxes next to the outbound events which should be retried in case of a failure)
    - **Support Session End**: Indicates a session has ended. This is required for session reports to be imported into Salesforce.
    - **Customer Exit Survey is Completed**: Indicates a customer exit survey has been completed.
    - **Representative Exit Survey is Completed**: Indicates a representative exit survey has been completed.

- **Hostname**: (the hostname of the Salesforce site)
- **Authentication Context URL**: **/services/oauth2/token** (i.e., the Salesforce OAuth token URL)
- **Salesforce Client ID**: (Consumer Key from the Salesforce connected application)
- **Salesforce Client Secret**: (Consumer Secret from the Salesforce connected application)
- **Salesforce Username**: (Username from the Salesforce API account)
- **Salesforce Password**: (Password from the Salesforce API account)
- **Outbound Event Context URL**: (URL used in Salesforce to handle the outbound event request)

For importing Remote Support sessions into Salesforce (most common use), use:

/services/apexrest/BGIntegration/SessionUpdate will route requests to the SessionUpdateController

For simply recording the outbound event in Salesforce, use:

/services/apexrest/BGIntegration/OutboundEvent will route requests to the OutboundEventController

Click **Submit** to save the configuration.

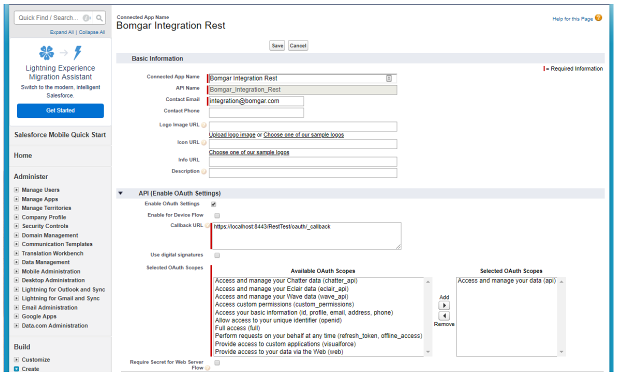
Configure Salesforce

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

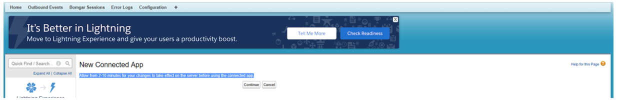
Create an API User Account

1. In Salesforce, go to **Setup > Users**, click the **New User** button, and enter unique information to identify the account to use with BeyondTrust.
2. Go to **Setup > Manage Users > Profiles**, open the profile of your new user, and click **Edit**.
3. Under **Administrative Permissions**, check the **API Enabled** box.

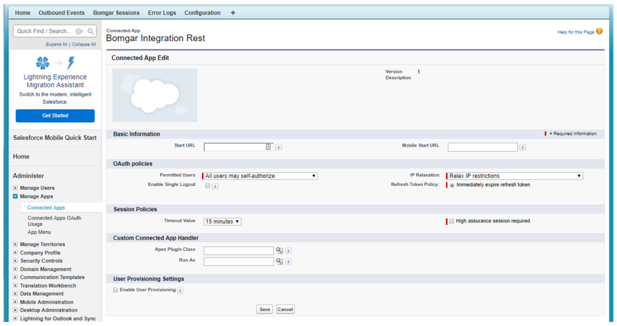
Create a Connected App



1. In Salesforce, go to **Setup > Build > Create > Apps**, click the **New** button under the **Connected Apps** list, and enter the following values:
    - **Connected App Name**: BeyondTrust Integration Rest.
    - **API Name**: BeyondTrust_Integration_Rest.
    - **Contact Email**: Customer supplied email - not a BeyondTrust address.
    - **Enable OAuth Settings**: This box must be checked.
    - **Callback URL**: This field is not used by the integration, but a value is required in the Connected App form.
    - **Selected OAuth Scopes:** Select **Access and manage your data (api)**.
2. Click **Save**.
3. A message appears, displaying, *Allow from 2-10 minutes for your changes to take effect on the server before using the connected app*.
4. Click **Continue**.



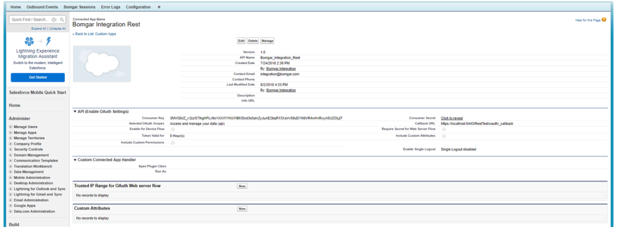
Configure the Connected App



1. Under **Setup > Administer > Manage Apps > Connected Apps**, in the list of apps, click the link titled **BeyondTrust Integration Rest**.
2. Click the **Edit Policies** button and check the following fields under **OAuth Policies**:
    - **Permitted Users**: All users may self-authorize
    - **IP Relaxation**: Relax IP restrictions
3. Click **Save**.

Copy the Consumer Key and Secret

1. Under **Setup > Build > Create > Apps > Connected Apps**, in the list of connected apps, click the link titled **BeyondTrust Integration Rest**.
2. Under the API (**Enable OAuth Settings**) section, highlight and copy the values in the **Consumer Key** and **Consumer Secret** fields to a temporary place such as Notepad.
3. For the **Consumer Secret** field, you first need to click the **Click to reveal** link to see the actual value.



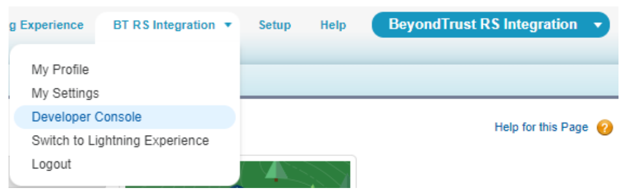
Enable Automatic Case Transitions with Apex Triggers

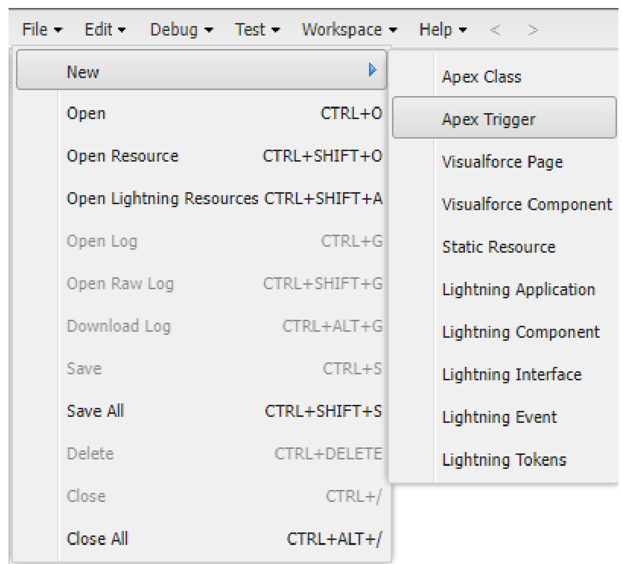
The Remote Support middleware plugin provides a **.trigger** file for use with Salesforce Apex triggers, allowing you to automatically transition cases when exit surveys are completed.

1. Extract the **Representative_Exit_Survey_Trigger.trigger** file from the middleware plugin download.
2. Open the Developer Console from the Salesforce instance.
3. Open the **File > New > Apex Trigger** menu.
4. Enter **Representative_Exit_Survey_Trigger** for the trigger name, and then select **BGIntegration__Representative_Exit_Survey_Response__c** as the sObject.

> ***Note:*** *The dropdown selection list is in alphabetical order.*

5. Open the extracted **Representative_Exit_Survey_Trigger.trigger** file in **notepad.exe**, copy the entire contents of the file, and paste the contents into the newly created Apex trigger in the Developer Console.
6. Read and follow the instructions at the top of the newly created trigger for custom configuration and the creation of a customer exit survey trigger (if required).
7. Save the file.
8. The new Apex trigger automatically executes when new Remote Support Exit Surveys are added to any tickets with associated BeyondTrust Remote Support sessions, and transitions cases according to the configuration contained within the trigger.



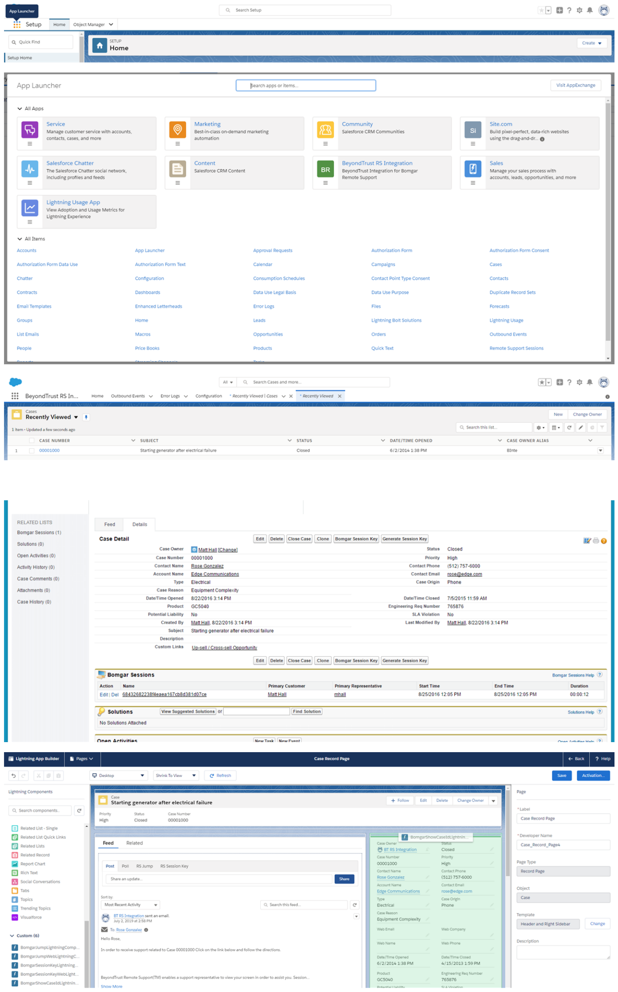


Lightning Web Components

Configure Salesforce Lightning Web Components

For Salesforce customers that use the lightning experience, several lightning components are available to configure a more flexible UI layout. All of the steps in this section take place in the Salesforce Lightning UI interface.

1. Click the **App Launcher** button.
2. Click **Cases**.
3. Select a **Case** by clicking a **Case Number**.
4. Select the **Settings Gear**.
5. Select the **Edit Page**.
6. Find the **Web Component** under **Custom**.
7. Drag a component into the layout.
8. Click **Save**.
9. Click **Back** to return to the case screen.



Lightning Web Components List

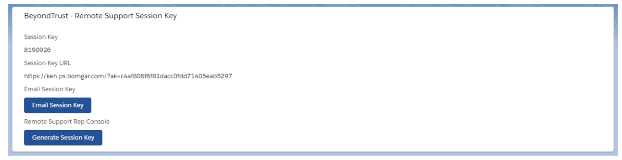
The following Salesforce Lightning components come installed with the BeyondTrust Remote Support and Salesforce Integration.

Case ID Lightning Web Component

This component displays the internal case id for the current case record.

Session Key Lightning Web Component

This component displays:



- **Session Key**: This key can be used to launch a support session using the support portal with the current case id as the external key.
- **Session Key URL**: This URL can be used to launch directly into a support session using the browser with the current case id as the external key.
- **Email Session Key Button**: This button sends the session URL to the client that opened the case.
- **Generate Session Button**: This button launches a remote session for the support representative.

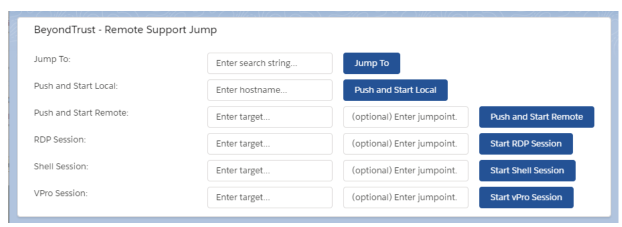
Web Session Key Lightning Web Component

This component displays:

- **Session Key**: This key can be used to launch a support session using the support portal with the current case id as the external key.
- **Session Key URL**: This URL can be used to launch directly into a support session using the browser with the current case id as the external key.
- **Email Session Key Button**: This button sends the session URL to the client that opened the case.
- **Generate Session Button**: This button launches a remote session for the support representative.

Jump To Lightning Web Component

This component displays several forms that allow you to Jump to a system using different Jump methods with the rep console.

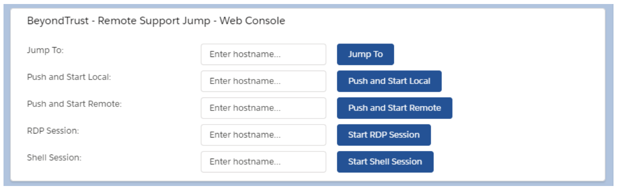


- **Jump To**: Search for endpoint and Jump to client.
- **Push and Start Local**: Jump to pinned host name.
- **Push and Start Remote**: Jump to specific target optionally using a Jumpoint.
- **RDP Session**: Jump to specific target optionally using a Jumpoint.
- **Shell Session**: Jump to specific target optionally using a Jumpoint.
- **VPro Session**: Jump to specific target optionally using a Jumpoint.

Web Jump To Lightning Web Component

This component displays several forms that allow you to Jump to a system using different Jump methods with the rep console.

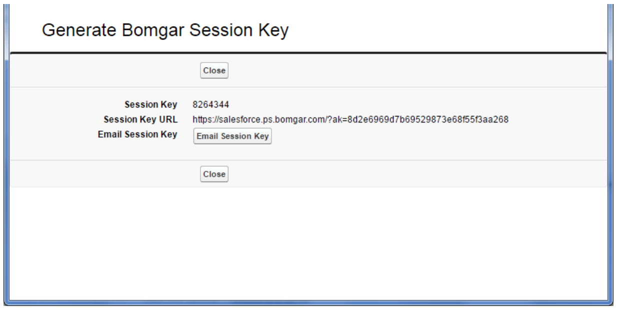
- **Jump To**: Search for endpoint and Jump to client.
- **Push and Start Local**: Jump to pinned host name.
- **Push and Start Remote**: Jump to specific target optionally using a Jumpoint.
- **RDP Session**: Jump to specific target optionally using a Jumpoint.
- **Shell Session**: Jump to specific target optionally using a Jumpoint.



Test the Integration between Salesforce and BeyondTrust Remote Support

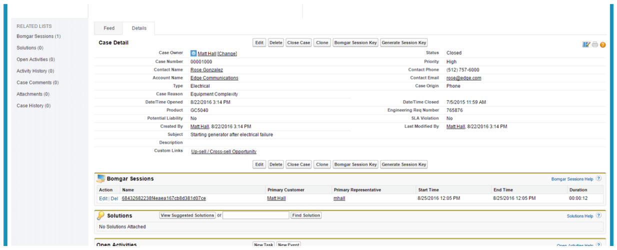
The following steps take place in Salesforce.com and BeyondTrust and are provided to ensure that the integration works properly. Troubleshooting suggestions are provided with each step in case of failure.

Test Session Key Generation



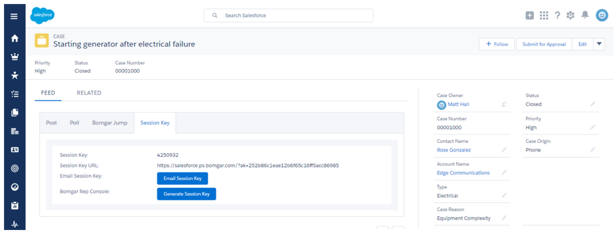
1. Log in to the BeyondTrust representative console, and then log in to Salesforce.com with the same account. If BeyondTrust and Salesforce.com use different authentication systems, manually assign your BeyondTrust user to your Salesforce.com user via the **User Layout** in Salesforce.com.
2. Open a 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:
   - The Salesforce.com user account is mapped to a BeyondTrust user account as described in this guide.
   - The Salesforce.com API user connection test completes successfully.
   - The BeyondTrust **Hostname**, **Username**, and **Password** fields are set correctly in Salesforce.com under **Configuration**.

Test BeyondTrust Session Import



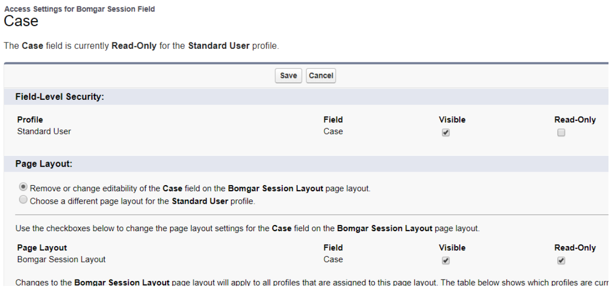
1. Log in to Salesforce.com as an ITIL user or an admin. Use the **BeyondTrust Session Key** or **Generate Session Key** button as described above to start a BeyondTrust session.
2. End the session from the representative console and close any surveys and/or session end messages on the representative 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:
   - The API user connection test completes successfully.
   - There are no BeyondTrust errors reported for your Salesforce.com instance in the BeyondTrust **/login > Management > Outbound Events** list.
   - 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 in to the BeyondTrust representative console, and then log in to 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 will launch the BeyondTrust representative console, subsequently opening the session key dialog box.

Test Remote Support Sessions Related List Is Displayed (For Lightning UX Only)



1. In Salesforce (Classic View), go to Setup (from the header menu).
2. Under **Administer > Security Controls > Field Accessibility**, click **BeyondTrust Remote Support Session** from the list.
3. Under **Choose your view**, click the **View by Fields** link.
4. In the **Fields** option list that displays, click **Case**.
5. Click the link next to the type of user (perhaps Standard User) that the related list is not showing.
6. Under the **Field-Level Security** section, check the **Visible** box on the row for the type of user you selected in the previous step.

This gives users the level of access they need to view the Remote Support Sessions related list within a Case record.

Salesforce Integration Troubleshooting

This is designed to assist members of implementation and support teams who are either installing or supporting the Salesforce Integration. The items listed in this ever-growing document cover potential issues one may encounter when working with the integration, along with steps to take to investigate and alleviate those issues. *Salesforce error logs* refers to the **Error Logs** tab in Salesforce, which can be found by selecting the BeyondTrust RS Integration and then clicking the **Error Logs** tab. This section assumes you have a base knowledge of both Salesforce and Remote Support.

Session Key Button or Tab Displays "This Site Can't Be Reached Error"

This error appears in Salesforce Classic when the Remote Support Web Session Key button is clicked, and in Salesforce Lightning when the **Generate Session Key** button under the **RS Session Key** tab is clicked.

> ***Tip:*** *Make sure the B Series Appliance hostname for the B Series Appliance Configuration record is set to a valid hostname and that it is reachable on the network.*

Generate Session Key or Web Session Key Button Displays "Unauthorized Endpoint" Error

The full error may look something like:

Warning: HTTP Exception: Unauthorized endpoint, please check Setup-> Security -> Remote site settings. endpoint = https://support.example.com/oauth2/token.

This error manifests itself in Salesforce Classic when the **Generate Session Key** button is clicked, and in Salesforce Lightning when the **RS Session Key** tab is clicked.

> ***Tip:*** *Make sure the B Series Appliance hostname for the B Series Appliance Configuration record is set to a valid hostname and that it is reachable on the network.*

Nothing Happens When The Remote Support Session Key Button Is Clicked

This button is intended to launch the Remote Support Representative Console.

> ***Tip:*** *Make sure the B Series Appliance hostname for the B Series Appliance Configuration record is set to a valid hostname and that it is reachable on the network.*

> ***Tip:*** *Make sure the name of the B Series Appliance is set to* ***Default****.*

Generate Session Key Button or RS Session Key Tab or RS Jump Tab Displays B Series Appliance Configuration "Default" Was Not Found Error

This error occurs whenever the default B Series Appliance is not named **Default**. The name field is different than the hostname field, which contains the B Series Appliance address. The name field is arbitrary, but the first or only one in the list must be set to **Default**.

> ***Tip:*** *Make sure the name of the B Series Appliance is set to* ***Default****.*

'Error Validating Parameter 'queue_ID': The Representative Could Not Be Found"

If you get an error stating, *Error validating parameter 'queue_id': The representative could not be found*, this indicates that the Salesforce user who is trying to generate a session key is not mapped to a Remote Support user. Typically, an LDAP store is used for both Salesforce and Remote Support; thus usernames in each system match exactly.

> ***Tip:*** *If an LDAP store is not used and the usernames between Salesforce and Remote Support do not match exactly, the usernames must be manually mapped so that when a session key is generated, a Remote Support user can be found.*

> *For more information, please see* *"Add Remote Support Username to User Layout" on page 17* *in this integration installation guide.*

"Requested Support Representative Is Not Available at This Time"

If you get an error stating, *Requested support representative is not available at this time*, this indicates that the **Use repRep Console for Session Keys** setting is unchecked in the B Series Appliance configuration AND the representative that is mapped to the Salesforce user who generated the session key is not logged into the Remote Support Representative Console.

> ***Tip:*** *Have the representative log in to the Remote Support representative console OR check the* ***Use Rep Console for Sessions Keys*** *box and the representative console is launched if it is installed on the representative's workstation.*

Support Sessions Aren't Being Written to Salesforce

If support sessions aren't being written in Salesforce, there could be a communication issue. First check to ensure communication is open from Remote Support to Salesforce.

> ***Tip:*** *Login to the Remote Support* ***/login*** *interface and ensure* ***Support Session End*** *is checked on the* ***HTTP Recipient for the Outbound Event****. If* ***Support Session End*** *is not checked, check the box, save the HTTP Recipient, then run another support session and see if the record is written to Salesforce.*

Tip: *If the Outbound Event looks good, login to the Remote Support* ***/appliance*** *interface and run a TCP test to the hostname of the Salesforce instance on port 443. If the TCP test yields a non 200 response, recommend the network team be involved to determine if there is a network block in place, such as a firewall or network rule.*

Tip: *Ensure the outbound event HTTP Recipient URL is set to* ***http://salesforce-beyondtrust-site-hostname/bomgar/BGIntegration__SessionUpdateHandler*** *and matches the URL of the site which was created in the Salesforce Installation guide.*

Tip: *Double-check and reset the* ***OAuth Client ID*** *and* ***OAuth Client Secret*** *fields on the B Series Appliance record in Salesforce. It's very common that this OAuth Client Secret value is copied to the clipboard, but the API Account record is never saved in Remote Support* ***/login****. We recommend that you copy the value and immediately save the API Account, then paste the value in the B Series Appliance record in Salesforce. Run another support session. If the* ***Support Session*** *record still does not show up in Salesforce, check the BeyondTrust RS Integration Error Logs tab in Salesforce to see if there are any errors that may shed light on why the record isn't being written.*

Data Is Missing from the Support Session in Salesforce

If data is missing from the **Support Session** record, it's possible the Remote Support event types have not been updated or only a subset of the event types have been set to be imported for each support session record that is written to Salesforce.

Tip: *Identify which pieces of data are missing, then check the* ***Selected Event Types*** *field under the B Series Appliance configuration in Salesforce to see if a subset of the events are set to be imported. If you don't see any events, it's possible the* ***Event Types*** *were never imported into Salesforce, as outlined in the Installation guide for this integration.*