Configuring Service Center

https://campus.barracuda.com/doc/84313787/

Networking Requirements

Salesforce restricts outbound connection to the following:

- 80 - This port only accepts HTTP
- 443 - This port only accepts HTTPS
- 1024 - 66535 (inclusive) - These ports accept HTTP or HTTPS

This means that your SCMessaging website or virtual directory must run on one of the allowed ports, or else Salesforce will not ba able to make a successful connection.

Importing the Salesforce Service Desk Module

The service desk module that makes the integration with Salesforce possible can be downloaded from the Partner Portal, or installed from a folder in the extracted source files.

To download the Salesforce Service Desk Module

1. In Service Center, click **Update Center** > **Components**.
2. Click **Get More.**
3. Type Salesforce in the **Search** box, then click the **Search** button.
4. Select the check box, then click **Install**.

To import the Salesforce Service Desk Module

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Add** > **Browse**.
3. Click **Browse** and navigate to **Salesforce Service Desk Module v1.0.sdm**.
4. Click **OK**.
5. The service desk module opens to the first page in the configuration wizard. Proceed with the next section if you are ready, or choose Cancel to complete the integration at a later time.

Note: After upgrading an existing Salesforce connector, you must save the configuration to ensure that any required updates are pushed to your Salesforce instance.

Completing the Service Desk Configuration

Ticket status mapping between Salesforce and Barracuda Managed Workplace is two-way, which means that you can select the appropriate Salesforce case status for ticket updates from Barracuda Managed Workplace, and you can select the appropriate Barracuda Managed Workplace ticket status for case updates from Salesforce. This two-way mapping allows you to control how statuses are mapped when the number of statuses between the two systems is inconsistent. It is strongly recommended that you maintain consistency in status mappings between the two systems.
You can create custom ticket statuses in Barracuda Managed Workplace in addition to the four system statuses, to map to Salesforce case statuses. For more information, see Creating Custom Ticket Statuses.

To complete the configuration

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. In the **Security Token** field, type the value that was emailed to you by Salesforce.
4. In the **User Name** field, enter the username for the dedicated Salesforce integration user you created earlier.
   Note: All Salesforce user names are in the form of an email address, but need not be associated with an actual mailbox.
5. In the **Password** field, enter the password for the dedicated Salesforce integration user you created earlier.
6. Optionally, in **Website URL**, type the URL of the Salesforce instance you plan to use. By default, this field is set to https://login.salesforce.com.
7. To require that any future configuration to the Salesforce service desk module requires a password re-entry, select the **Require password re-entry to configure this service desk module check box.**
8. **Click Next.**
9. To map Barracuda Managed Workplace sites to Salesforce accounts, do the following:
   - Select a Barracuda Managed Workplace site, and then type in the name of the corresponding Salesforce account. As you type, a list of matching Salesforce accounts appears.

   Note: A maximum of 50 matching SalesForce accounts will appear. You can futher restrict the criteria to return fewer accounts. You can also enter a % (percentage sign) to show the top 50 accounts.
   - Optionally, you can filter by Salesforce record type and by the parent account. Click Show Filter to display the optional filters. From the Record Type list, select the Salesforce record type. In the Parent Account box, type the name of the parent account. All children accounts will be displayed. Select the Salesforce account you want to link.
   - Click Link when you have made an appropriate set of selections.

   Note: You can link multiple Barracuda Managed Workplace sites to a single Salesforce account, if appropriate.

10. The table displays all the mappings you have made so far. If required, click **Unlink** to undo the association between Service Center sites and Salesforce accounts.
11. Click **Next**.
12. Choose Barracuda Managed Workplace users to map to Salesforce users by checking corresponding boxes for each in their lists. Click **Link** when your selections are complete.
    Caution: The integration presents all Salesforce users, but only users licensed as Salesforce or Salesforce Platform can own cases. Do not map users with other license types to Service Center user accounts.
13. The table displays all the mappings you have made so far. If required, click **Unlink** to undo the association between Service Center users and Salesforce users.
14. Click **Next**.
15. Map ticket statuses by doing the following:
    - •For each of the Barracuda Managed Workplace ticket statuses, select an appropriate Salesforce case status.
    - •For each of the Salesforce case statuses, select an appropriate Barracuda Managed Workplace ticket status.

    Note: In addition to the four standard Barracuda Managed Workplace ticket statuses, there may be custom Barracuda Managed Workplace ticket statuses available for you to map.
16. Click **Next**.
17. For each of the three Barracuda Managed Workplace ticket priorities, select an appropriate Salesforce case priority.
18. Click **Next**.
19. Type in the time you would like to run the daily asset synchronization between Barracuda Managed Workplace and Salesforce. Alternatively, use the time picker to select a time.
    Note: The Sync Now button is not enabled until after the configuration is completed.
20. Click **Next**.
21. By default, all tickets are sent. You can filter the tickets that are sent by clearing the check box beside any of the following:
    - To exclude site-based tickets, clear the **All site-based tickets** check box, or click the + icon beside the check box, and clear any of the following: **Manual tickets**, **Site not communicating**, **Loss of monitoring protocol**, and **New device tickets**.
    - To exclude website-based tickets, clear the **All website-based tickets** check box.
    - To exclude all device-based tickets, clear the **All device-based tickets** check box.
    - To exclude device-level monitor tickets, click the + icon beside the **All device-based tickets** check box to expand it, and then clear the **Device-level monitor tickets** check box.
    - To filter policy module tickets, click the + icon beside the **All device-based tickets** check box to expand it, and then select the **Filtered policy modules option** button. Click Add, then select the check box that corresponds with each policy module you want to add. Click **Apply**.
    - To filter policy set tickets, click the + icon beside the **All device-based tickets** check box to expand it, and then select the **Filtered policy sets option** button. Click **Add**, and select the check box that corresponds with each policy set you want to add. Click **Apply**.
22. Click **Save**.

Modifying Web Service Credentials

If changes to the dedicated integration account's credentials in Salesforce have been made, you must update the service desk module configuration in Service Center.

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. Update the **Security Token**, **User Name**, or **Password** as required.
4. Optionally, in Website URL, type the URL of the Salesforce instance you plan to use. By default, this field is set to https://login.salesforce.com.
5. To require that any future configuration to the SalesForce service desk module requires a password re-entry, select the **Require password re-entry to configure this service desk module** check box.
6. Click **Save**.

Updating Site Account Mappings

Additional client sites added to Service Center must be mapped to Salesforce accounts.

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. Click **Site Account Mapping**.
4. To map Barracuda Managed Workplace sites to Salesforce accounts, do the following:
    - Select a Barracuda Managed Workplace site, and then type in the name of the corresponding Salesforce account. As you begin typing, a list of matching Salesforce accounts will appear.

   Note: A maximum of 100 matching SalesForce accounts appear. You can further restrict the criteria to return fewer accounts. You can also enter a % (percentage sign) to show the top 100 accounts.
    - Optionally, you can filter by Salesforce record type and by the parent account. Click **Show Filter** to display the optional filters. From the record **Type** list, select the Salesforce record type. In the **Parent Account** box, type the name of the parent account. All children accounts will be displayed. Select the Salesforce acc
    - When you're done, click **Link**.

   Note: You can link multiple Barracuda Managed Workplace sites to a single Salesforce account, if appropriate.
5. Click **Save**.

Updating User Mappings

Additional users added to Service Center must be mapped to Salesforce users.

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. Click **Site User Mapping**.
4. Choose Barracuda Managed Workplace users to map to Salesforce users by checking corresponding boxes for each in their lists. When you’re finished, click **Link**.
5. The table displays all the mappings you have made so far. If required, click **Unlink** to undo the association between Service Center users and Salesforce users.
6. Click **Save**.

Modifying Ticket Status Mapping

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. Click **Ticket Status Mapping**.
4. For each of the Barracuda Managed Workplace ticket statuses, select an appropriate Salesforce case status.
5. For each of Salesforce case statuses, select an appropriate Barracuda Managed Workplace ticket status.
6. Click **Save**.

Modifying Ticket Priority Mapping

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. Click **Ticket Priority Mapping**.
4. For each of the Barracuda Managed Workplace ticket priorities, select an appropriate Salesforce case priority.
5. Click **Save**.

Modifying Asset Synchronization Settings

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. Click **Asset Synchronization**.
4. Enter the time you would like to run the daily asset synchronization between Barracuda Managed Workplace and Salesforce. Alternatively, use the time picker to select a time.
5. Click **Save**.

Modifying Ticketing Options

1. In Service Center, click **Configuration** > **Service Desks**.
2. Click **Salesforce Service Desk Module**.
3. Click **Ticketing Options**.
4. By default, all tickets are sent. You can filter the tickets that are sent by clearing the check box beside any of the following:
    - To exclude site-based tickets, clear the **All site-based tickets** check box, or click the **+** icon beside the check box, and clear any of the following: **Manual tickets**, **Site not communicating**, **Loss of monitoring protocol**, and **New device tickets**.
    - To exclude website-based tickets, clear the **All website-based tickets** check box.
    - To exclude all device-based tickets, clear the **All device-based tickets** check box.
    - To exclude device-level monitor tickets, click the **+** icon beside the **All device-based tickets** check box to expand it, and then clear the **Device-level monitor tickets** check box.
    - To filter policy module tickets, click the **+** icon beside the **All device-based tickets** check box to expand it, and then select the Filtered policy modules option button. Click **Add**, and select the check box that corresponds with each policy module you want to add. Click **Apply**.
    - To filter policy set tickets, click the **+** icon beside the **All device-based tickets** check box to expand it, and then select the **Filtered policy sets option** button. Click **Add**, and select the check box that corresponds with each policy set you want to add. Click **Apply**.
5. Click **Save**.