Salesforce.com Integration Guide
Vanilla Forums

Introduction

Occasionally, a question or comment in customer community forum cannot be resolved right away by a community manager and must be escalated to another employee via a CRM system. Vanilla's Salesforce.com integration allows users with the right permissions to create a Lead or Case in Salesforce directly from Vanilla.

This guide outlines how to setup the integration and how it works.

1. Turning On The Salesforce Plugin in Vanilla

● Only Administrators can enable plugins in Vanilla. From the Addons page of the Dashboard (Dashboard > Addons > Salesforce), enable the Salesforce plugin.

This plugin will only be visible to customers subscribed to the Corporate, Enterprise or VIP plan. If you do not see the plugin, please contact your account manager for more information.

2. Configuring Salesforce

Vanilla's integration is not currently available as a managed package through the AppExchange. The integration requires that your Salesforce administrator create a new 'Connected App' and create a custom field.

2.1 Create a new connected App

● On the Apps page (Setup > Build > Create > Apps) click on 'New.

● Enter the following information:

　● Connected App Name: **Vanilla**

　● API Name: **Vanilla**

　● Logo Image URL:
　https://vanillaforums.com/applications/vfmarketing/design/images/125-vanilla-logo.png

　● Icon Image URL:
　https://vanillaforums.com/applications/vfmarketing/design/images/16-vanilla-icon.png

　● Contact email: support@vanillaforums.com

　● Description: **Integration of Vanilla Forum to Salesforce to Create Leads and Cases**

　● Enable oAuth Settings: **Selected**

　● Callback URL: **https://[FORUM-URL]/profile/salesforceconnect , where [FORUM-URL] is the name you gave your vanilla forum when it was created or the name of your custom domain. The call back URL must be HTTPS.**

　● Selected oAuth Scopes: **Select the following:**

○ **Perform requests on your behalf at any time (refresh_token, offline_access)**
○ **Full access (full)**
○ **Provide access to your data via the Web (web)**

● Save

● Obtain the Application ID and Secret.
These values will be entered into the Vanilla to connect the applications later on.

```
▼ API (Enable OAuth Settings)
Consumer    3MVG9A2kN3Bn17hvtheZR5USnA6Cl6Yp7opjXrOHG.La_hSitzpaeRVhjx9ipPYmGlZYYhnAxi9tOWMlgBU6W  Consumer    Click to reveal
Key                                                                                              Secret
Selected    Provide access to your data via the Web (web)                                        Callback    https://inftest.vanillaforums.com/profile/salesforceconne
OAuth       Full access (full)                                                                   URL
Scopes      Perform requests on your behalf at any time (refresh_token, offline_access)
```

2.2 Create a custom fields to display the forum comment URLs

When creating Lead or Cases from Vanilla, the URL of the original comment will be stored in a custom field that is a part of the Lead or Case object in Salesforce. These fields cannot be created manually since Vanilla reserves the Vanilla_ namespace.

● To create the custom fields, install this package:
https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000LJb9

This will create a custom field (Vanilla_forumURL_c) in the Lead and Case objects.

● To create the custom fields in a sandbox account, change the package URL to:
https://test.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000LJb9
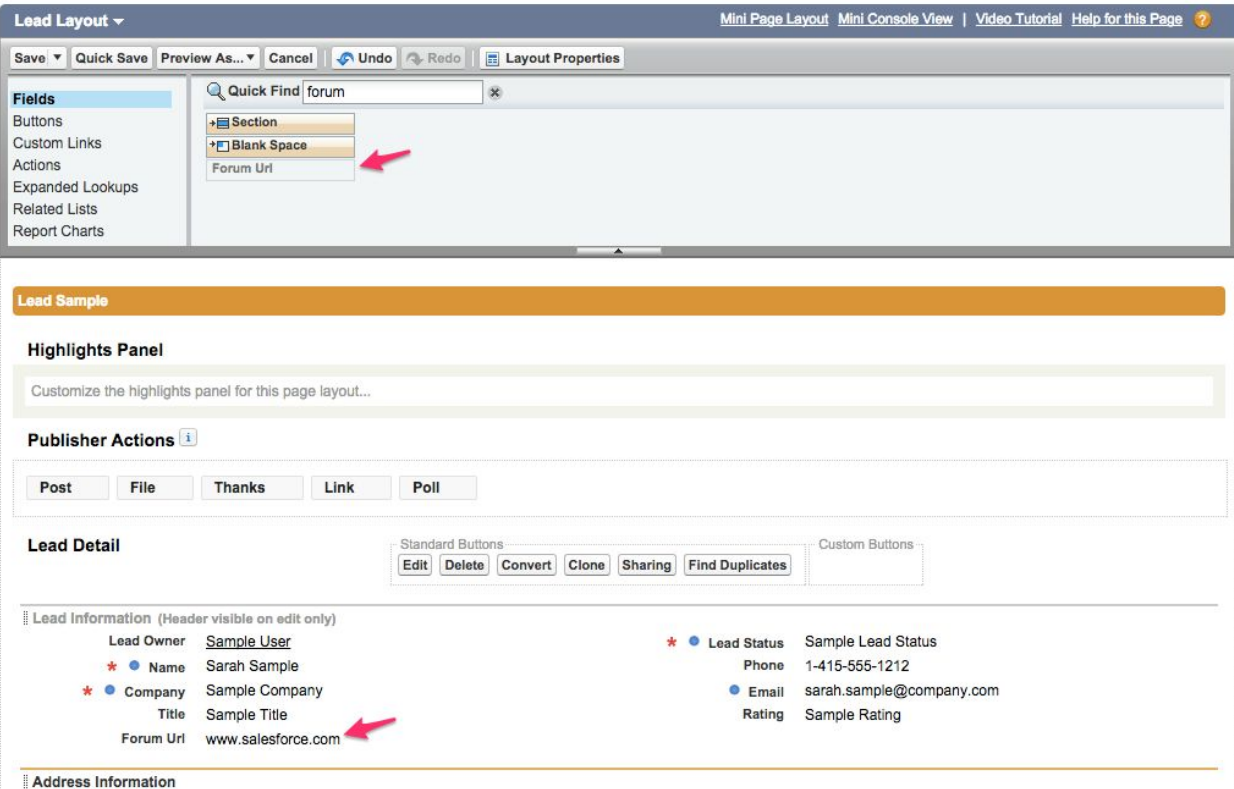
During installation, you will be asked to select a security level. Select 'Grant access to all users' unless you would like to restrict the custom field to a specific group of users.

2.3 Display the ForumURL field in the Lead and Case detail

To display the URL of the original forum post in the Lead or Case detail, you will need to add the Forum URL field to each layout.

● In Salesforce, go to App Setup > Customize > Leads > Page Layouts

- Add the Forum URL field to the Lead Detail panel.
- Save

Repeat the process for Cases.

- In Salesforce, go to App Setup > Customize > Cases > Page Layouts
- Edit 'Case Page Layout'
- Save

If you would like the Forum URL to appear on the closed cause page layout, edit that layout to include the field.

3. Configure the Integration Settings in Vanilla

3.1 Application ID

● Go to the Salesforce Settings page (Dashboard > Forum > Salesforce or Dashboard > Addons > Salesforce > Settings)

● Enter the Application ID and Secret that was obtained in step 2.1

3.2 Authentication URL

This field allows you to authenticate to a Salesforce account other than your production account.

● Set the URL to **https://login.salesforce.com** to point to your production Org

● When testing this integration with a Salesforce sandbox Org, enter **https://test.salesforce.com**

3.3 Setting Permissions in Vanilla

● Only users that are in a Role that have the 'Staff' permission are able to create Leads or Cases. The Staff permission may not be a default on Roles such as Administrator or Moderator. Please check the Role permissions for users that should have permission to create Leads or Cases.

3.4 Global Login Option

There are two ways of authenticating Vanilla to Salesforce. The recommended way is for each staff member to authenticate themselves when creating a Lead or Case using their own Salesforce credentials. This way, you will be able to see which staff member created the Lead or Case in Salesforce.

The other way is to use a Global Login. This allows staff members that do not have a Salesforce license to create Leads and Cases. The downside is that all Leads and Cases will show as having been created by the same Salesforce user.

Authentication of Vanilla users to Salesforce is done using oAuth. Salesforce usernames and passwords are never entered into Vanilla and are not stored in Vanilla. The authentication uses secure tokens that can be revoked at any time by your Salesforce Administrator.

- To configure the Global Connection, click Enable. You will be redirected to Salesforce.com and asked to enter username and password for the Salesforce account that you want to use to make the global connection. Please note that all Leads and Cases created in Vanilla will show this account as the 'owner' in Salesforce.

4. Using the Salesforce Integration

4.1 Authenticating Individual Users

- ● Individual staff members must authenticate themselves to Salesforce before being able to create Lead or Cases. (This is not necessary if you are using the Global Login option.) To authenticate yourself, go to Edit Profile > Social Logins and connect to Salesforce.
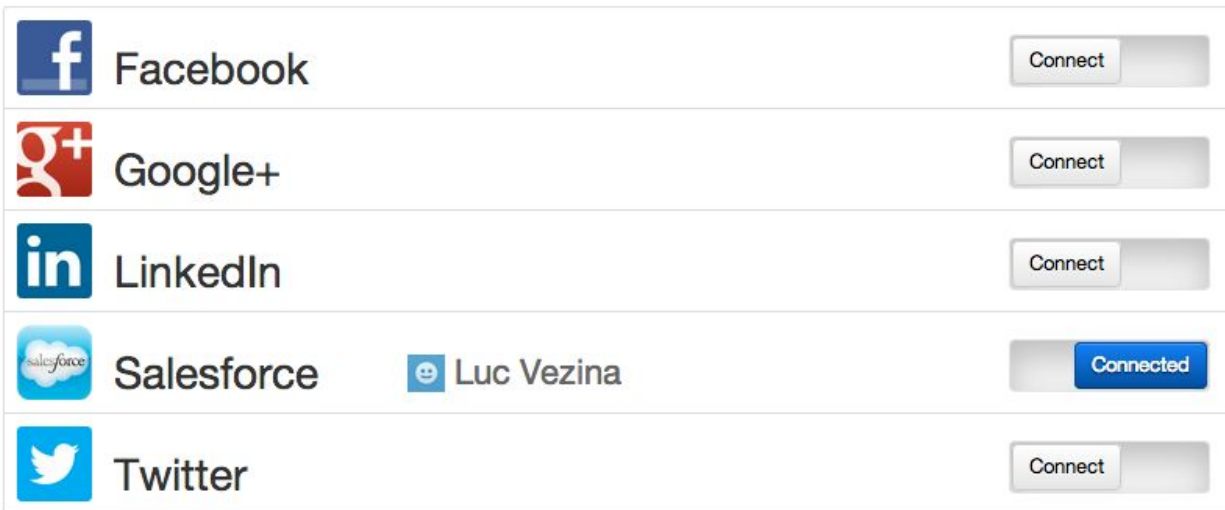
- ● If a staff members attempts to create a Case or Lead and is not authenticated, a pop-up will prompt the user to do so.

4.2 Creating a Lead

● To create a Lead, select 'Salesforce - Add Lead' from the gear icon drop down.
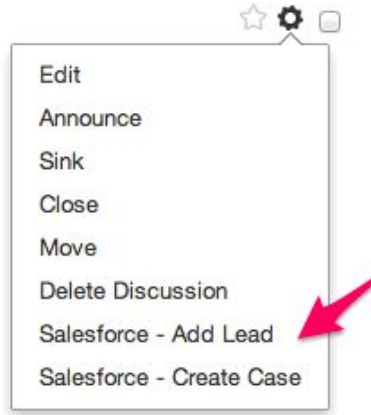
● Name and email will be pre-populated. Other required fields will need to be filled out.
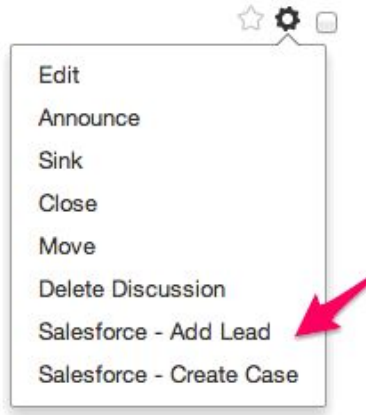

● The Lead will be created in Salesforce and an information panel will be displayed (to staff only) under the post. The Lead status will be updated each time the page is loaded.

4.3 Creating a Case

- To create a Case, select 'Salesforce - Create Case' from the gear icon drop down.

- A pop-up will appear. Name and email and the comment text will be pre-populated. Other required fields will need to be filled out.

- The Case will be created in Salesforce and an information panel will be displayed (to staff only) under the post. The Case status will be updated each time the page is loaded.

● The Case is displayed in Salesforce.

Case
00001004

Customize Page | Edit Layout | Printable View | Help for this

Hide Feed

Post | File | Thanks | More ▾

Write something...   **Share**

● Follow

Followers

🔍 | Show All Updates ▾   No followers.

There are no updates.

« Back to List: Custom Apps

Solutions [0] | Open Activities [0] | Activity History [0] | Case Comments [0] | Case History [1] | Attachments [0]

Case Detail   Edit Delete Close Case Clone

Case Owner	Luc Vezina [Change]	Contact Phone	
Case Number	00001004	Contact Email	james.bond@vanillaforums.com
Contact Name	James Bond	Forum Url	https://demo.vanillaforums.com/discussion/6/do-...
Account Name			

▼ **Additional Information**

Status	New	Type	
Case Origin	Vanilla	Case Reason	
Priority	Medium		
Subject	Do you have API documentation in Chinese?		
Description	I can't find any Chinese language API documentation on your website.		
Date/Time Opened	06/08/2014 12:21 PM	Date/Time Closed	

11