

Kovair Salesforce Integration Datasheet

A SNEAK PEAK

'Kovair Salesforce Integration Adapter' lets you integrate Salesforce application or the custom force.com applications to other on-premise or cloud applications, such as HelpDesk and Issue Management applications like JIRA, TFS, Remedy, ServiceNow. Salesforce entities like account, cases and tickets become exposed in real time.

FEATURES & BENEFITS

- ❖ Supports processing of tickets and cases raised in Salesforce through automated workflows via Omnibus platform in other integrated tools like JIRA, TFS, Remedy, and others.
- ❖ Supports direct event-based actions like Add, Delete and Edit for all entities through Omnibus.
- ❖ Establishes bi-directional synchronization between Salesforce and the other integrated tools.
- ❖ Confirms bi-directional synchronization of Salesforce entities like Cases and Tickets with entities in other integrated tools.
- ❖ Assists Support Team for enhanced customer service.
- ❖ Integration with HelpDesk and Issue Management applications enhances communication across teams.

OVERVIEW

Salesforce is a cloud-based CRM solution from Salesforce.com that brings companies and their present and potential customers on a same integrated platform. This integration results into better systematized information and enhanced data exchange. Since CRM is indispensable for any organization, getting Salesforce integrated with various tools involved in the process chain can help companies stay connected to customers, restructure processes and improve cost-effectiveness. Customers can also power their businesses by building and maintaining their customized business applications on force.com, a platform offered by Salesforce.

Kovair Salesforce Integration Adapter

The Kovair Salesforce adapter is REST based integration, when integrated to the Salesforce application (also custom applications) using Kovair Omnibus platform, allows users to connect their Salesforce application to various other on-premise or cloud-based applications like HelpDesk and Issue Management applications (JIRA, TFS, Remedy, ServiceNow). When it is connected to these applications/tools, Salesforce entities like Account, Cases and Tickets becomes accessible to these applications in real time. Salesforce Integration adapter depends on REST API for exposing metadata for mapping. Dataflow is bi-directional, so the updates are synchronized to Salesforce instantaneously. This integration between Salesforce and other tools is achieved with the help of Kovair Omnibus platform and various tool-specific adapters in the eco-system.

Benefits of Kovair Salesforce Integration Adapter

- **Improved Collaboration:** Integration of Salesforce with HelpDesk and ITSM tools like JIRA, TFS, ServiceNow, with the help of Kovair Salesforce Integration adapter leads to greater collaboration between the Software Development team and Customer Support team. The dedicated Customer Support team can swiftly submit issues or flaws raised by the customers with the Development team and can keep the customers informed about the resolution status of these issues.
- **Advantage Cloud:** Kovair Salesforce Integration adapter aids in integrating Salesforce applications with the other cloud-based tools existing in their network.

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- Enhanced Customer Satisfaction:** This integration can help the Development team to prioritize and resolve defects as per customers' status and requirements. The Support personnel can keep the customers up to date about their ticket status and accelerate the issue resolution procedure. This kind of service is enormously appreciated by the existing customers and help win over new business.
- Traceability & Visibility** - Salesforce users have broad visibility into customer cases and tickets because of Salesforce integration with the Issue Tracking tools like JIRA. These tools are in turn linked to other development tools via Kovair Omnibus platform. Issues can be traced back to the customers in Salesforce applications and then fixed using Development tools available within the eco system.

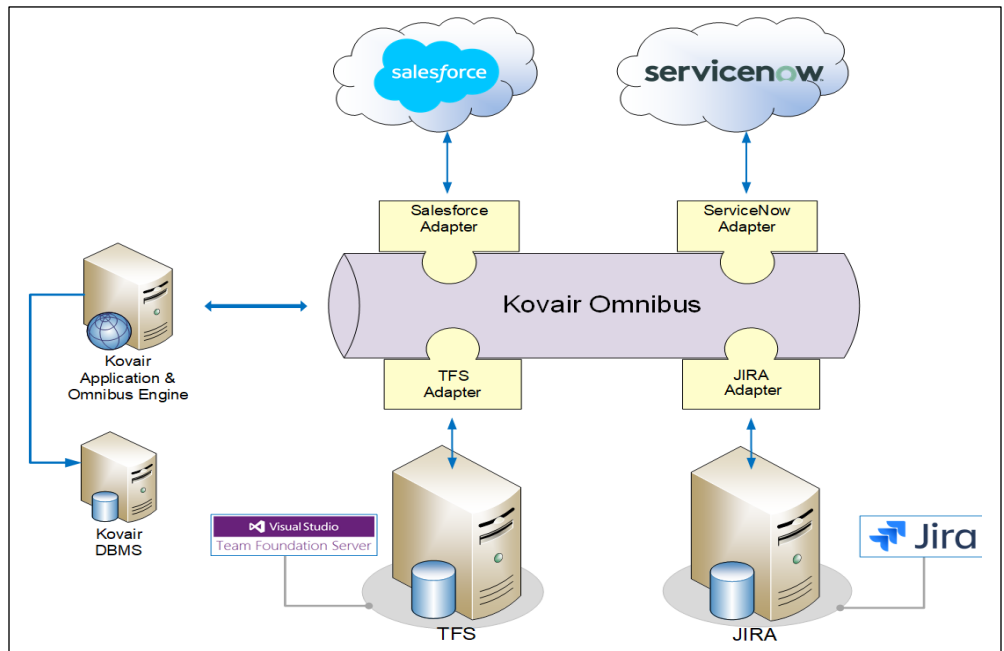


Fig: Integrating Salesforce with tools like JIRA, TFS, ServiceNow through Kovair Omnibus

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System Requirements

- ❖ **Operating Systems:** Windows Server 2008 R2 or higher.
- ❖ **Databases:** SQL Server 2008 R2 and above for Adapter Database.
- ❖ **IIS:** IIS 7.0 or higher.
- ❖ **.Net Framework:** 4.6 on Adapter Server.

Services Supported in Kovair Salesforce Adapter

Exposed Entities	Supported Events	Supported Actions	Relationships
❖ All the system defined as well as custom entities are supported.	❖ Supports basic events like Add, Edit and Delete for all entities.	❖ Supports basic actions like Add, Edit and Delete for all entities.	❖ Relations are exposed by Entity Object fields.

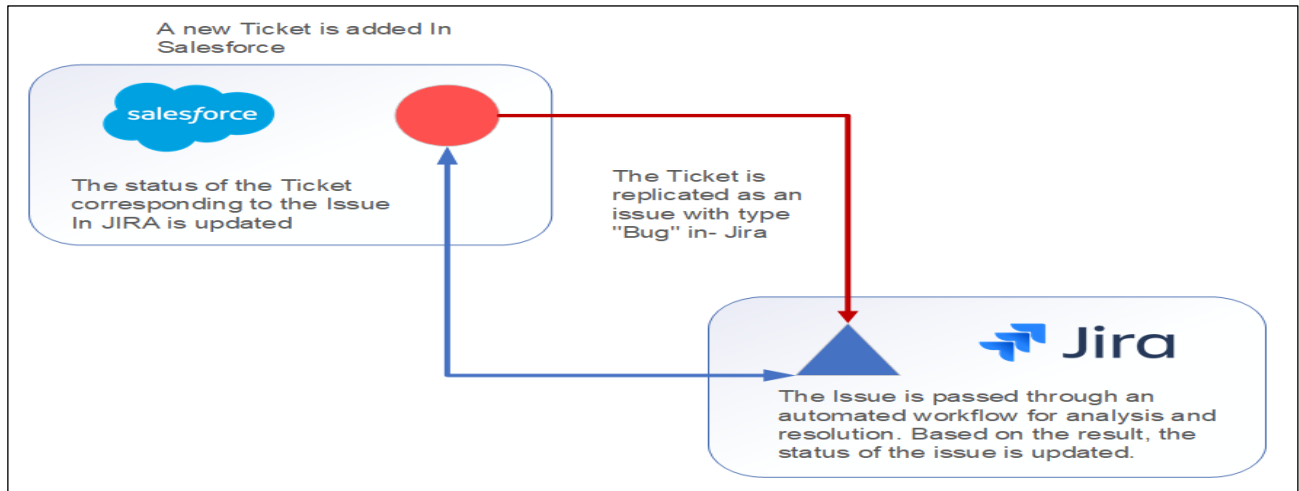
Comments

Category	Add	Edit	Delete
Action	✔	✘	✔
Event	✔	✘	✔

* Note: Comments are exposed for Case Entity. For other entities Notes are exposed as Comments

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Use Case Scenario with Salesforce Integration



Salesforce-JIRA Integration

As shown in the above example, you can integrate the cloud-based application Salesforce with on-premise application (JIRA) so that Tickets in Salesforce are replicated as Issues in JIRA and then passed through automated workflow for Issue Analysis and Resolution. Accordingly, the status and priority of the Issue is updated in JIRA. All the modifications to the Issue in JIRA are replicated in the corresponding Ticket in Salesforce.

Note: The adapter as developed and offered by Kovair follows the subject tool's standard specifications. Any deviations from the tool's typical use pattern may not have been anticipated in our off-the-shelf product. For any customization or special configuration needs, please contact Kovair Sales – sales@kovair.com

Kovair Software Inc.: Kovair is a California based software product company specializing in the domain of Application Lifecycle Management (ALM). Kovair's focus on integrating third party best-of-breed ALM tools enables creation of applications in a synchronized tools environment.

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